

DID YOUR ADDRESS, PHONE NUMBER, OR EMAIL CHANGE?  
**(IF YES, PLEASE FILL OUT A NEW CLIENT INFO FORM)**

☐ YES ☐ NO

DID YOUR FILING STATUS CHANGE? DID YOUR DEPENDENTS CHANGE?  
**(IF YES, PLEASE FILL OUT A NEW CLIENT INFO FORM)**

☐ YES ☐ NO

DID THE DIRECT DEPOSIT ACCOUNT WE HAVE ON FILE CHANGE?  
**(IF YES, PLEASE FILL OUT A NEW DIRECT DEPOSIT FORM)**

☐ YES ☐ NO

DID YOU OR YOUR DEPENDENTS HAVE MARKETPLACE INSURANCE?  
**(IF YES, PLEASE PROVIDE FORM 1095-A)**

☐ YES ☐ NO

HAVE YOU EVER BEEN A VICTIM OF IDENTITY THEFT?  
**(IF YES, PLEASE PROVIDE IRS-ISSUED IP PIN LETTER)**

☐ YES ☐ NO

DO YOU HAVE ANY CRYPTOCURRENCY TRANSACTIONS TO REPORT? (DIGITAL CURRENCY)  
**(IF YES, PLEASE PROVIDE CRYPTOCURRENCY FINANCIAL INFO, REPORTS, OR ANY FORMS RECEIVED)**

☐ YES ☐ NO

DID YOU OR YOUR SPOUSE RECEIVE OVERTIME PAY (TIME & A HALF) DURING 2025?  
**(IF YES, PLEASE PROVIDE THE LAST PAYSTUB OF THE YEAR WITH YEAR TO DATE WAGES OR A QUALIFIED OVERTIME REPORT FROM THE EMPLOYER)**

☐ YES ☐ NO

DID YOU OR YOUR SPOUSE RECEIVE TIPS DURING 2025?  
**(IF YES, PLEASE PROVIDE THE OCCUPATION AND AMOUNT OF TIPS RECEIVED AND INCLUDED IN W-2 INCOME OR GROSS RECEIPTS)**

☐ YES ☐ NO

DID YOU OR YOUR SPOUSE FINANCE A NEW AMERICAN MADE VEHICLE IN 2025?  
**(IF YES, PLEASE PROVIDE THE VIN NUMBER AND INTEREST EXPENSE STATEMENT FROM FINANCER)**

☐ YES ☐ NO