

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