

**2023 CLIENT INFORMATION SHEET**  
(Please complete ENTIRE form)

Do you need us to call you to discuss your tax return before preparing them? \_\_\_\_\_

Taxpayer Name: \_\_\_\_\_ Occupation: \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_

Spouse's Name: \_\_\_\_\_ Occupation: \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_

Preferred Contact? (circle one) Taxpayer or spouse? Phone #: \_\_\_\_\_ Text? Yes (see next line) or No

Text ReedandDailey to 724-546-8450 to sign-up for texting E-mail: (print clearly) \_\_\_\_\_

Current Address: \_\_\_\_\_  
(Street Address) (City) (State) (Zip)

(County) (School District) (Township/Municipality)

If you are a **NEW client**, please provide us with your social security numbers:

\_\_\_\_\_ (Yours) \_\_\_\_\_ (Spouse)

1. Did you move in 2023? If yes, date moved? \_\_\_\_/\_\_\_\_/2023  
Previous Address: \_\_\_\_\_
2. Did your Name or Marital Status change in the year 2023? Yes ( ) No ( )  
If yes, previous name or status? \_\_\_\_\_
3. At any time during 2023, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency? Yes ( ) No ( )
4. Did you have access or "Signature Authority to any bank account, or brokerage account, held in any Foreign Country during any time in 2023? Yes ( ) No ( ) If YES, then details must be provided before filing.

**DEPENDENTS – If claiming the SAME AS LAST YEAR, just check here ( ).**

Please list additional dependents on a separate sheet of paper if needed. (**Do NOT** list Spouse below.)

Please check "YES" if the dependent lived with you for **MORE** than half of the year 2023. You may include their time away at college.

	M/F	ADD	REMOVE	
Name: _____	[ ]	[ ]	[ ]	SSN: _____ - _____ - _____ DOB: ____/____/____ ( ) If Yes
Name: _____	[ ]	[ ]	[ ]	SSN: _____ - _____ - _____ DOB: ____/____/____ ( ) If Yes

**Form 1095 must be provided if you had "Marketplace" Health Insurance**

**E-Filing: (FREE with tax preparation)** E-filing is mandatory per the IRS unless you have a valid objection.

**TAX RETURN WITH REFUNDS: (Choose only ONE option below.)**

- ( ) Direct Deposit refund(s) to my checking/savings account/IRA account. You may split the refund among different accounts. Please provide a "VOIDED" check or other proof of account numbers.
- ( ) Use the same account as last year. Initial here \_\_\_\_\_
- ( ) Have my refund mailed to my home.

**TAX RETURN PREPARATION FEES: (Choose only ONE option below.)**

- ( ) Tax preparation fees paid upon completion with cash, check, debit card or credit card.
- ( ) Tax preparation fees deducted from your refund. (**In addition to Reed & Dailey's tax preparation fees, Refund Advantage charges an additional fee of \$39.95 to provide this service which will be deducted from your refund. This service requires additional paperwork. You will need an unexpired photo ID for both the Taxpayer and Spouse, and Social Security Cards for ALL members of the household.**)

**TAX RETURN DELIVERY OPTIONS: (Choose only ONE option below.)**

- ( ) I/We will pick up our completed tax return.
- ( ) Mail my completed tax forms to me (freight charges may apply). I/we will sign forms and mail (or email) them back to you for e-filing.