

CONTACT INFORMATION SHEET

Date: _____

Client Name: _____

Occupation in 2023: _____

Date of Birth: _____

Cell Phone: () _____

Email Address (personal only): _____

Legal Spouse Name: _____

Occupation in 2023: _____

Date of Birth: _____

Cell Phone: () _____

Email Address (personal only): _____

Current Address: _____

All clients will receive a PDF copy of return. If you wish to receive a paper copy there is a \$50 fee. All 2023 return will be emailed directly to you or uploaded on share drive. Please check off appropriate box so we may send returns as requested. If you require **both** a PDF copy and a paper copy of your return, there will be an additional \$50 fee.

_____ PDF Copy to CLIENT Shared Portal

_____ PDF Copy to email address above

_____ BOTH hard copy and PDF copy (additional \$50 fee)