

Michael R. Green & Associates
Returning Client Information Sheet

Today's Date: _____

General Information

Last Name/First Name	Preferred Phone	E-mail	Preferred contact method/time

Direct Deposit

_____ I would like to have my refund check mailed to my tax return address.
 _____ I would like to have my refund direct deposited into my bank account.

Is the bank account for direct deposit the account used on the prior year tax return? _____
 If no, what is your preferred bank account?

_____	_____	_____	
Bank Name	Routing #	Account #	Checking Savings

General Questions

Question	Y	N	New Information
<u>Change in Filing Status?</u>			
<u>Change in Dependent Info?</u> Provide Name/DOB/Relationship/SS# May need additional documents			
<u>Change in Address?</u> Please provide New Address & Date/Month of Move			
<u>Did you receive the full March 2021 (1,400/ea) EIP3/Stimulus?</u> If not, what was received?			
<u>Did you receive any monthly Child Tax Credit payments?</u> If so, did you receive a Letter 6419? Did the amount on the letter match what you received?			
<u>Did you pay any Child Care Expenses?</u>			

<p><u>If yes, was it the same Child Care Provider?</u> <u>If not, who is the new provider?</u></p>			
<p><u>Did you pay any Education Expenses?</u> <u>If so, did you receive a 1098-T?</u></p>			
<p><u>Any Stock Sales?</u> <u>Did you receive a 1099-B?</u></p>			
<p><u>Did you Buy, Sell, or hold any Cryptocurrency?</u> Will need additional documents</p>			
<p><u>Did you Buy or Sell any Real Estate?</u> Need Copy of Settlement Sheet</p>			
<p><u>Did anyone receive unemployment or PUA assistance in 2021?</u> Need 1099-G</p>			
<p><u>Did you receive an additional refund from the retroactive change to unemployment?</u> How much?</p>			
<p><u>Did you make any Contributions to a non-profit (Church, Charity, Fire Company, etc.)?</u> How much?</p>			
<p><u>Was anyone enrolled with the Health Insurance Marketplace?</u> Need 1095-A</p>			