## $\underline{\text{update/questionnaire}}\,2023\text{--}2024$

## PLEASE PRINT LEGIBLY

\_\_\_PREVIOUS\_\_\_NEW

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SEE OVER

WE CAN DISCUSS ONLY WHICH APPLIES TO	YOU
\$ STARTED NEW BUSINESS	\$PURCHASED/SOLD HOME (give details)
\$ UNIFORM EXPENSES	\$ HAVE RENTAL PROPERTY (give details)
\$ LEASED/PURCHASE VEHICLE	\$ JOB SEEKING EXPENSES
(Job related only)	
\$ CASUALTY LOSES	\$ PAID CONTRIBUTIONS/DONATIONS
\$ PAID MTG INT/R/E TAXES	\$ PAID MEDICAL EXPENSES
(submit statements)	\$ Health Insurance Premiums
\$ MOVING EXPENSES	\$ UNION DUES \$ TAXES
(Within 100 miles of old location)	
	\$ CURRENT YR RETIREMENT CONTRIB.
\$ ESTIMATED TAXES YOU PAID	
ADDITIONAL COMMENTS: (Disaster Victims	/Military, etc.)
I (WE) WOLLD LIKE TO KNOW THE BEEL	JND AMOUNT BEFORE MAKING A FINAL DECISION!
	R REFUND PREFERENCE:
NEW I'M REQUESTING A REDUND A	DVANCE \$ (SEPARATE FEE APPLIES)
FREE E-FILE	
	k in Mail (provide acct. info below)
E-FILE BANK OPTIONS - *2pcs '	Valid ID required for Bank Products *
Deduct All fees from my Refund (this is E-File Bank Product)	I will pay Prep fees in Advance (E-File FREE)
DIRECT DEPOSIT -within-10 Business days	State Refund E-File
CHECK Here -10-14 Business Days	Receive Here
CHECK in Mail - within 21 Business Days	Receive Mail
	Receive Direct Deposit
Prepaid Visa Debit Card (Refund deposit 10	-14 business days - Federal & State or either one)
Required For Direct Deposit SAVINGS	CHECKING
	ACCOUNT#
Taxpayer Signature	Spouse Signature
E-File (Bank Product Option Only)	
Choose 1 security question:	OR
Mother's maiden	