

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 TO REPORT? (DIGITAL CURRENCY)
(SALES, STALKING, MINING, LENDING, NFT ACTIVITY TRADES)
(IF YES, PLEASE PROVIDE CRYPTOCURRENCY FINANCIAL INFO, REPORTS, OR ANY FORMS RECEIVED)

YES NO