Remedy Tax Services

WORKSHEET 05
GETTING STARTED

New client information sheet

Tell us who is on the return and what changed this year. It takes about five minutes and saves most of the first appointment.

You

First name | Middle initial | Last name

Date of birth | Occupation | Mobile phone

Email | Best way to reach you | Preferred language

Spouse, if married

First name | Middle initial | Last name

Date of birth | Occupation | Mobile phone

Home address

Street address and apartment | City | State | Zip

Other states where you lived or worked this year

Filing status last year

- ☐ Single
- ☐ Married filing jointly
- ☐ Married filing separately
- ☐ Head of household
- ☐ Qualifying surviving spouse
- ☐ Not sure, or first U.S. return

Dependents

Children and other people you support.

Full name	Date of birth	Relationship	Months lived with you	Student?

What happened this year?

Tick everything that applies.

- ☐ Got married
- ☐ A dependent moved out or turned 17
- ☐ Changed jobs or lost a job
- ☐ Turned 65 (you or your spouse)
- ☐ Had income or a bank account abroad
- ☐ Earned tips or overtime pay
- ☐ Divorced or separated
- ☐ Moved to another state
- ☐ Started or closed a business
- ☐ A family member passed away
- ☐ Bought, sold or was paid in digital assets
- ☐ Bought a new car with a loan
- ☐ Had or adopted a child
- ☐ Bought or sold a home
- ☐ Retired or began Social Security
- ☐ Received a letter from the IRS or a state
- ☐ Had Marketplace health insurance
- ☐ Paid for college or student loans

Your refund or payment

- ☐ Direct deposit to my bank account
- ☐ Paper check by mail
- ☐ Apply my refund to next year's tax

Do you have an Identity Protection PIN from the IRS?	☐ Yes	☐ No
Did someone else prepare your return last year?	☐ Yes	☐ No
May we contact you by text message about your return?	☐ Yes	☐ No

How did you hear about us?

Anything else we should know?

Questions, worries, or something unusual about this year.

Bring to your first appointment

- ☐ Photo ID for each adult
- ☐ All income forms (W-2, 1099)
- ☐ Social Security cards or ITIN letters
- ☐ A voided check for direct deposit
- ☐ Last year's tax return
- ☐ Any IRS or state letters

Keep it safe. Do not write full Social Security numbers or bank account numbers on this sheet. Give those in person, or upload the documents to your secure client vault. Please do not email this worksheet; upload it at the client portal instead.