

**Boyle & Henderson, P.C. Client Data Sheet**

**Albia: 641-932-7567**

**Oskaloosa 641-673-4571**

**Ottumwa: 641-682-2640**

<u>TAXPAYER Name</u>	<u>Date of Birth (if new client)</u>	<u>Social Security #(if new client)</u>

<u>SPOUSE Name</u>	<u>Date of Birth (if new client)</u>	<u>Social Security #(if new client)</u>	
<u>Address</u>	<u>City</u>	<u>State</u>	<u>Zip Code</u>
<u>County</u>	<u>School District</u>	<u>Phone Number</u>	
<u>Email</u>			

If you moved from one state to another in 2022, please provide date of move: \_\_\_\_\_

Marital Status as of 12/31/2022:     Single     Married     Separated (>6 months of 2022)     Widower

Filing HOH Claimed as a dependent on another return

Were there any changes to your family/household for 2022 (marriage, divorce, new dependent, death, etc.)? If yes, please provide details such as date of death, etc.

**DEPENDENTS:**

<u>Name</u>	<u>Social Security #</u>	<u>Date of Birth</u>	<u>Months Lived in Home</u>	<u>Relationship and M or F</u>	<u>In College? If yes, 1098-T included?</u>

Do any of the children have a disability?     Yes     No

Is it anticipated that a different taxpayer will seek to claim a child listed above as a dependent for tax year 2022?

Yes \_\_\_\_\_ Which dependent \_\_\_\_\_ No \_\_\_\_\_

**Please provide your banking information for direct deposit of refund:**

<u>Bank Name</u>	<u>Routing Number</u>	<u>Account Number</u>	<u>Checking</u>	<u>Savings</u>