

Returning Customer Information

Name(s) on return: _____

If the answer to any of the following questions is YES, please check the box and attach an explanation sheet or use the back of this sheet:

- Did your marital status change (married, divorced, or widowed)?
- Did your address change during 2015?: New address: _____
- Did your telephone number change?: New phone #: _____
- Did your email address change?: New email address: _____
- Did you have any changes in your dependents (births, adoptions, deaths, kids moved out)?
- Were any of your dependents between 19 and 24 and not enrolled in school at least 5 months?
- Did any of your children over 18 have earned income of more than \$4,000?
- Did you or your spouse make any gifts valued at more than \$14,000 during 2015?
- Did you pay or collect alimony during 2015?
- Did you start a business or farm during 2015?
- Did you receive any income not represented by a W-2, 1099, or otherwise not reported with your general tax information?
- Do you have receipts and records to support your expenses? I don't necessarily need to see them but you must have them available in the event of questions from the IRS.
- Did you and all of your dependents have health insurance coverage for 2015? If not, please list who did not and for which months (remember: one day of coverage counts for coverage for that month so actual dates are important)
- If you have a refund due, do you want it direct deposited into your bank account? If YES, please provide banking information below, even if it has NOT CHANGED.
- Check here if you do NOT want your tax return electronically filed.

Banking information for direct deposit of your refund:

Bank Name: _____

Routing Number: _____

Account Number: _____

Mark One:

- Checking
- Savings