

**Thomas P Crowley, CPA
2019 Tax Client Information**

Taxpayer Name(s) _____ Date: _____

Home # _____ Work # _____ Cell # _____ Primary Email _____

Please provide any change in your address: _____

Dependents

Do you need to add or delete any dependents during 2019? If so, please list below:

Add ___ Delete ___ Name _____ SSN _____ DOB _____ Relationship _____

Add ___ Delete ___ Name _____ SSN _____ DOB _____ Relationship _____

- If a dependent is over 18, can you still claim them? Yes ___ No ___

Health Insurance

- Did you purchase health insurance through the marketplace for yourself and all claimed dependents?

Yes ___ No ___ If so, please provide **Form 1095A**.*

*Failure to provide Form 1095A may result in IRS penalties.

Identity Theft requirements: In order to comply with Alabama's mandatory identity theft protection laws, please provide a copy of current driver's licenses for you and your spouse (if applicable.)

NOTE: If we are preparing a child's tax return and he/she is 16 years old or older, a copy of their current driver's license is required.

If you want your refund directly deposited into your bank account, please provide:

Bank Name _____ Indicate type of account Checking ___ Savings ___

Acct # _____ Routing # _____

***If you want to use the banking information that was used for 2018, please initial here _____

Please answer the following questions.

- Did you purchase items on the internet that you did not pay sales tax on? Yes ___ No ___ If yes, total \$ _____
- Was anyone in your family enrolled in college in 2019? Yes ___ No ___ If yes, please provide copy of **Form 1098T**.

Did your filing status (marital) change? If so, please provide your new status _____

NOTE: If you are a new client, please provide a copy of your previous year's tax return.

*****Taxpayer Engagement Certifications*****

- The information furnished to Thomas P Crowley, CPA PC for preparing my 2019 tax returns is true and correct to the best of my knowledge.
- I realize that the accuracy of my returns is my responsibility.
- Thomas P Crowley, CPA PC, was engaged to prepare my 2019 tax returns and only those returns. Any other services to be performed would be covered under a separate agreement.

Taxpayer Signature _____ Spouse Signature _____