

Thomas P Crowley, CPA
2021 New Client Information

Date Received _____

Taxpayer Name _____		Spouse Name (if applicable) _____	
Taxpayer Date of Birth _____		Spouse Date of Birth _____	
Taxpayer SS # _____		Spouse SS# _____	
Taxpayer Occupation _____		Spouse Occupation _____	
Home Phone # _____			
Taxpayer Work # _____		Taxpayer Cell # _____	Taxpayer Email _____
Spouse Work # _____		Spouse Cell # _____	Spouse Email _____
Address _____			
Filing Status _____		Did you file 2020 tax returns? ***Yes _____ No _____	
<i>***If yes, please provide a copy of your 2020 federal and state returns.</i>			

Dependents			
Name _____	SS# _____	DOB _____	Relationship _____
Name _____	SS# _____	DOB _____	Relationship _____
Name _____	SS# _____	DOB _____	Relationship _____
* If a dependent is over 18, can you still claim them? Yes _____ No _____			

Health Insurance
Did you purchase Obamacare health insurance through the marketplace for yourself and all claimed dependents? Yes _____ No _____ If yes, 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 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 acct: Checking _____ Savings _____
Routing # _____ Acct # _____

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 2021? Yes _____ No _____ <i>If yes, please provide copy of Form 1098T</i>
Did you receive the stimulus in Spring, 2021? Yes _____ No _____ If yes, how much did you receive? _____
Did you receive the advanced child tax credit? Yes _____ No _____ <i>If yes, please provide copy of IRS letter #6419 to us.</i>

****Taxpayer Engagement Certifications ****	
*The information furnished to Thomas P Crowley, CPA PC for preparing my 2021 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 2021 tax returns and only those returns. Any other services to be performed would be covered under a separate agreement.	
*If I use the Client Portal, I will receive my client copy in the portal.	
Taxpayer Signature _____	Spouse Signature _____
Date _____	Date _____