

**ELLIOTT AND ELLIOTT ACCOUNTANTS, LLC**

**2023 Intake Tax Return Questions:**

Name (TP): \_\_\_\_\_ Birthdate: \_\_\_\_\_ SSN: \_\_\_\_\_

Spouse (SP): \_\_\_\_\_ Birthdate: \_\_\_\_\_ SSN: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

At any time in 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? \_\_\_\_\_yes or \_\_\_\_\_no (Ex: Virtual Currency, Virtual assets, Cryptocoin, Bitcoin, NFT's, etc.)

Did you or your spouse update or renew your driver license in 2023 or 2024 or are you a new client? If so, we will need a copy of it. \_\_\_\_\_yes or \_\_\_\_\_no

**Driver License:**

TP State: \_\_\_\_\_ Number: \_\_\_\_\_ Date Issued: \_\_\_\_\_ Date Expired: \_\_\_\_\_

SP State: \_\_\_\_\_ Number: \_\_\_\_\_ Date Issued: \_\_\_\_\_ Date Expired: \_\_\_\_\_

Do you wish to have direct deposit? \_\_\_\_\_yes or \_\_\_\_\_no Is your banking information the same as last year for direct deposit? \_\_\_\_\_yes or \_\_\_\_\_no If it has change, you are a new client, or you are adding direct deposit this year, we will need to have your name of bank, routing number, and account number. We will take a copy of a check or a voided check for this information.

Were you ever denied the Earned Income Credit, Child Tax Credit, American Opportunity Tax Credit, Head of House, or Other Dependent Credit? \_\_\_\_\_yes or \_\_\_\_\_no

**Dependents Information:**

Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_ SSN \_\_\_\_\_

Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_ SSN \_\_\_\_\_

Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_ SSN \_\_\_\_\_

(Add more on back if needed)

Signature of Taxpayer: \_\_\_\_\_ Date: \_\_\_\_\_

Signature of Spouse: \_\_\_\_\_ Date: \_\_\_\_\_