

ELLIOTT AND ELLIOTT ACCOUNTANTS, LLC

2024 Intake Tax Return Questions:

Name (TP): _____ Birthdate: _____ SSN: _____

Spouse (SP): _____ Birthdate: _____ SSN: _____

Address: _____

Phone: _____ Email: _____

At any time in 2024, 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 2024 or 2025 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 changed, 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: _____