

DeBoer, Goodyke, Kahler & Tuttle PC  
2023 Client Information

**\*\*New Clients:** Please provide name, date of birth, Social Security number, and gender for taxpayer, spouse and all dependents.

**For All Clients**

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Taxpayer Name: \_\_\_\_\_ Spouse Name: \_\_\_\_\_  
Occupation: \_\_\_\_\_ Occupation: \_\_\_\_\_

Home Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  *No Changes to phone, email, or address? Check here!*

Taxpayer Email: \_\_\_\_\_ Spouse Email: \_\_\_\_\_  
*\*If filing jointly, please provide both taxpayer and spouse emails.*

Taxpayer's Spouse's  
Driver's License: \_\_\_\_\_ Driver's License: \_\_\_\_\_  
Issue Date: \_\_\_\_\_ Issue Date: \_\_\_\_\_  
Expire Date: \_\_\_\_\_ Expire Date: \_\_\_\_\_

Taxpayer Cell: \_\_\_\_\_ Spouse Cell: \_\_\_\_\_  
Home Phone: \_\_\_\_\_

Dependents: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*\*Any new dependents for 2023? Provide name, date of birth, gender, and Social Security Number.*

**Did you have any virtual currency transactions in 2023? YES or NO**

**For Direct Deposit of Refunds or Auto Payment of Taxes Due (see note below)**

*LMCU users: please provide the MICR number, not the acct number*

Bank Name: \_\_\_\_\_ Acct (or MICR) No: \_\_\_\_\_  
Routing No: \_\_\_\_\_ Acct Type: Savings or Checking (circle one)

**Did any of these events take place in 2023?**

\_\_\_\_\_ Marriage \_\_\_\_\_ Death of spouse or dependent  
\_\_\_\_\_ Divorce \_\_\_\_\_ Change of dependent status  
\_\_\_\_\_ Purchased or sold home \_\_\_\_\_ Received inheritance

**Estimated Tax Payments**

Please provide dates, amounts, check numbers (if applicable), and to which entity the tax payments were made (US Treasury, State of MI, City of Grand Rapids, e.g.)