



## Annual Client Update Questionnaire

In the last year, have any of the following occurred:

- Name changes \_\_\_\_\_
- Home address change \_\_\_\_\_
- Contact information
  - Phone number \_\_\_\_\_
  - Email \_\_\_\_\_
- Filing status change – Married, Single, HOH \_\_\_\_\_
- Change in dependents, either new dependents or change in filing status of current dependents (i.e. college students, parents, new children)
  - Dependent change \_\_\_\_\_
  - Dependent change \_\_\_\_\_
  - Dependent change \_\_\_\_\_
- New business ownership \_\_\_\_\_
- New rental real estate \_\_\_\_\_
- Bank change for direct deposit refunds \_\_\_\_\_

Note: This form is designed to provide an annual update to key client related information