

# Annual Update

## ALL INFORMATION MUST BE ENTERED

Name(s) as it appears on your Social Security card: \_\_\_\_\_

Date(s) of Birth (IF NEW CLIENT): \_\_\_\_\_

Driver's Lic. # & State – Self: \_\_\_\_\_ Issue Date: \_\_\_\_\_ Expire Date: \_\_\_\_\_

NYS Drivers ONLY-Document # (very small number/letters on the bottom right or back of ID)

– First 3 characters only: \_\_\_\_\_

Driver's Lic. # & State – Spouse: \_\_\_\_\_ Issue Date: \_\_\_\_\_ Expire Date: \_\_\_\_\_

NYS Drivers ONLY-Document # (very small number/letters on the bottom right or back of ID)

– First 3 characters only: \_\_\_\_\_

Occupation(s) (as you listed on your return): \_\_\_\_\_

Phone: \_\_\_\_\_ Can this # receive Text messages? YES NO

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

Current address: \_\_\_\_\_

Did you buy a new house? \_\_\_\_\_

Did you have health insurance for the entire year? YES NO Partial Year

**\*\*Please provide the 1095 form (A, B, or C) you received from your insurer.**

### **VERY IMPORTANT TO HAVE THIS**

Have your dependents changed? Anyone new to add or need to be removed?

\_\_\_\_\_

If a new dependent, please provide the full name, social security number, and date of birth:

\_\_\_\_\_

Direct Deposit for tax refunds (This needs to be verified each year)

Routing Number: \_\_\_\_\_ Bank Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

How would you like to receive your copy of the tax return? (Circle at least one)

Email Digital (pdf)

Paper – by mail

Paper – Office pick up

Would you like to review your tax return by pdf before it is e-filed? YES NO

How would you like to pay for the services of Susan G Baer, CPA, P.C.?

Debit the Bank Account Above Check/Cash Credit Card: Visa or Mastercard (add 3% fee)

Credit Card# \_\_\_\_\_ Exp. date: \_\_\_\_\_ 3-digit code: \_\_\_\_\_

**Level of service you request:** Please circle one or write your custom request in the space provided:

1) Do my return once a year, you will hardly hear from me and I am happy to just get my taxes DONE.

2) Do my taxes, I am glad the Susan G Baer, CPA, P.C. office is there for me year-round for any needs that arise, and I am glad to pay for the extra consulting.

3) I own a business or am a person who needs extra help and guidance through the year as well as year-end planning. Please help me stay on top of this throughout the year. I value the advice of Susan G Baer, CPA, P.C. and I understand these fees, beyond the cost of my return, will help me save in the long run.

4) Other - your custom note about what you expect and want from Susan G Baer, CPA, P.C. or about your specific situation.

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**NOTE:** Questions throughout the year and extra services provided beyond tax return preparation have additional fees, whether via email text or phone or in person. i.e. consulting, copies of returns and adding of receipts or anything beyond the normal tax preparation.

To have your tax return done as quickly and economically as possible, we recommend getting us all your tax documents and filling out the worksheets that can be found under the Information Tab on our website: [www.Northeastcpa.com](http://www.Northeastcpa.com)

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Thank you,

Susan G Baer, CPA PC