

CLIENT NAME: _____

Required Information

Please fill out the information below:

- **Dependents:** Any change in dependents? (Circle One) **YES NO**
If yes, please indicate changes below.

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- **Bank Information:** This information needs provided each year even if the information is same as prior year.

Bank Name: _____
Routing Number: _____
Account Number: _____
Checking or Savings (Circle One)

**The above bank information will be used for depositing refunds and/or withdrawal for balances due (additional authorization will be requested at completion of return for automatic withdrawals).

- **2024 Estimated Tax Payments:** If you made estimated payments, fill in the tables below. If you didn't, circle **NONE**.

Please note: These tax payments are ***not*** the 2023 balances due you would have paid with a 1040-V or Indiana Post Filing Coupon. These payments are estimates that you would pay toward your 2024 liability using 1040-ES or IT-40ES vouchers.

Date:	Fed Pmts	State Pmts

Tax Law Update:

** For 2024 the required threshold for receiving a 1099-K has been lowered to \$5,000. As a result, many taxpayers may receive a 1099-K. Taxpayers who use Venmo, Cash App, PayPal, or similar payment platforms should check their accounts to see if a 1099-K was issued. Please include any 1099-Ks with your information.**

- **Information Update/Verification:** This information needs provided each year even if the information is same as prior year.

○ Phone Number: _____

○ Email Address: _____

○ Address: _____

- **Additional Information for Preparer:**
