

# Required Information

CLIENT NAME: \_\_\_\_\_

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

- Phone Number: \_\_\_\_\_
- Email Address: \_\_\_\_\_
- Address: \_\_\_\_\_

- **Dependents:** Any change in dependents? (Circle One) **YES NO**  
If yes, please include additional information of the changes.

- **Refund Bank Information:** This information needs provided each year even if the information is same as prior year. The IRS will not be issuing paper checks for 2025 refunds.

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

\*\*In the event of a balance due, an additional authorization form for EFT payments will be necessary and will be provided at the time your returns are completed.

- **2025 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 2024 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 2025 liability using 1040-ES or IT-40ES vouchers.

Date:	Fed Pmts	State Pmts

\*\*Please turn these completed forms in with your tax documents.