**2022 RETURNING TAX CLIENT FORM**

**Please enter any information as it appeared on your last filed tax return**

**Legal First Name:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Middle Initial:** **\_\_\_\_ Legal** **Last Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Today’s Date [mm/dd/yyyy]:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Preferred Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Phone Type:**  Home Mobile Work Other: \_\_\_\_\_\_\_\_\_\_\_

**Preferred** **Email**: **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Email Type:**  Personal Work Other: \_\_\_\_\_\_\_\_\_\_\_

**Did your principal residence change in 2022?** Yes No (Fill out below address fields only if ‘Yes’)

**Street Address:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**State: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Postal Code: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Did your marital status change in 2022?** Yes No

**Any change in status for (or number of) dependent children?** Yes No

**Do you have a child(ren) in college:** Yes No

**Did you rent for your principal residence in MA?** Yes No

**Landlord Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Bought or sold real estate in 2022?** Yes No

**Did you have any work-related commuting expenses in excess of $150?** Yes No

**Any significant changes in filing status, income, or deductions from your last year’s return?**

Yes No

**Did you sell any cryptocurrency in 2022?** Yes No

**Who was your tax preparer for 2021 at Merrigan and Merrigan?**

**Bill Dave Nancy Kyle**

**Anything else we should be aware of?** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**Did your bank information change since last tax season?** Yes No

**If ‘Yes,’ please give us your up-to-date bank information for Direct Deposit/Auto Debit:**

**Bank Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Routing Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Full Bank Account Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Account Type:** Savings Checking

**How will you provide your tax documents to Merrigan and Merrigan?** (Circle your preferred method)\*

* Upload electronic PDFs via Secure Online Client Portal (Clio)
* Mail to Merrigan and Merrigan office (tracking service recommended)
* Drop-off in person

**How do you want to sign and receive your completed 2022 tax returns?** (Circle your preferred method)\*

* E-sign (DocuSign) and electronic PDF via secure email
* Sign at the office and pick-up hard copy
* Mail hard copy with self-address stamped envelope for signatures.

\*If you choose mail-in or drop-off, with e-sign, we will SHRED the documents after uploading a scan of the originals. **If you do not want your physical documents shredded, please do not choose e-sign** with the mail-in or drop-off options.