ALPHA TAX SERVICE

Client Questionnaire

What changed for you last year

alphatax200.com
(859) 307-1663

THIS FORM CONTAINS SENSITIVE INFORMATION

These questions tell us what changed in your life last year, which is usually where the deductions and the surprises both hide. Answer what you can — "not sure" is a perfectly good answer and gives us something to ask about. Return this form through the secure client portal at alphatax200.securefilepro.com.

YOUR NAME

TAX YEAR

1. Have you moved?

2. Have you gotten married, separated, or divorced?

3. Are you claiming any more or fewer dependents this year?

4. Did you start a business, partnership, LLC, or a corporation last year?

5. Did you take any money from an IRA, 401k, rollover, pension, etc?

6. Did you have any capital gain events, sale of property, stocks, digital currency, or any interest or dividend income?

7. Is there any event that you have questions about from last year?

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ANYTHING ELSE

8. Anything else we should know before we start on your return?

CERTIFICATION

I certify that the information I have given on this questionnaire is true, correct, and complete to the best of my knowledge and belief. I understand that Alpha Tax Service will rely on it in preparing my return, and I will tell them promptly if anything changes or if I find that something here is wrong.

☐ **I certify the above**

INITIALS

SPOUSE INITIALS (IF FILING JOINTLY)

SIGNATURE

SIGNATURE

SPOUSE SIGNATURE (IF FILING JOINTLY)

DATE