

# MARTIN ACCOUNTING SERVICES, INC.

222 West Pointe Drive, Swansea, IL. 62226 ---- 618-233-3000 ---- fax 618-233-3003

## Returning Client Information

Name: \_\_\_\_\_

New address if changed from last year: \_\_\_\_\_  
\_\_\_\_\_

Best way to reach you (please select preferred method of contact from drop down):

Phone: \_\_\_\_\_ Email Address: \_\_\_\_\_

- |  |     |                          |
|--|-----|--------------------------|
| 1) Did you pay sales tax on any large ticket purchases such as a car, boat, home remodel   | Yes | No                       |
| 2) Did you pay real estate taxes during 2023?  | Yes | No                       |
| 3) Who else is authorized to pickup your tax return _____<br><i>*Due to federal privacy requirements, we cannot give out your tax return to someone else unless authorized to do so above.</i> |     |                          |
| 4) I/We want direct deposit of any refund:<br><i>* Please leave voided check for direct deposit if different than last year</i>  | Yes | No                       |
| 5) Any changes to claimed dependents?<br><i>*Please note any changes in the comment section below</i>  | Yes | No                       |
| 6) Did any members of your tax household have Market Place health insurance in 2023?   | Yes | No                       |
| 7) In an effort to reduce waste, we will send you an electronic copy of your return for tax year 2023. Please Indicate if you would instead prefer a bound copy by checking the box:           |     | <input type="checkbox"/> |
| 9) Did you receive, sell, exchange or otherwise dispose of virtual currency in 2023?   | Yes | No                       |
| 10) Did you make estimated tax payments for tax year 2023?<br>If yes, please provide your preparer with exact amounts paid to the IRS or state.  | Yes | No                       |

Comments:

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