

**GILES UNDERWOOD AND WILSON, LLC
CLIENT INTAKE FORM**

Taxpayer

Spouse

<u>Name:</u>		
<u>Social Security #</u>		
<u>Date of Birth:</u>		
<u>Phone #</u>		
<u>Address:</u>		
<u>Email Address:</u>		
<u>Driver's License #</u>		
<u>Driver's License Iss Date</u>		
<u>Driver's License Exp Date</u>		

*******PLEASE PROVIDE A COPY OF YOUR DRIVER'S LICENSE*******

Who is the primary contact person? _____

How would you like for us to contact you? Email Phone

What is the latest we can contact you if we call you after hours?

Would you like a digital or paper copy of your tax returns? Digital Paper

List every person in your household and their date of birth:

Can these people be claimed as dependents on your tax return? Yes No

If you have a refund, would you like to have the refund direct deposited? Yes No

If you owe, would you like to have the taxes taken out of your account? Yes No

If Yes to either above question, Please provide the following or a voided check:

Bank Name: _____

Bank Routing Number: _____

Bank Account Number: _____

Checking or Savings

****Did you buy, sell, or trade in any digital assets in 2023?*** Yes No

Were there any significant changes that would affect tax situation in 2023? Yes No

If Yes, please provide a brief description below:
