



# DEVRIES + ASSOCIATES CPA

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## 2024 Tax Return Client Information

This form **MUST BE COMPLETED AND RETURNED** prior to us preparing your tax return.

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

Mailing Address: \_\_\_\_\_

Did you Move After 1/1/24? No  Yes  If yes, date moved: \_\_\_\_\_

Any Dependent Changes (birth, no longer dependent, etc.) for 2024? (Submit copy of Social Security card for new child.)

Full Legal Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ SSN: \_\_\_\_\_

Explanation/Details on Dependent Changes: \_\_\_\_\_

### **Contact Information for Completed Tax Return (Choose Preferred Method)**

Phone: \_\_\_\_\_ Cell  Home  Other  Best time to contact \_\_\_\_\_

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

### **Tax Return Delivery Options**

We want to provide you with copies of your tax return(s) in the format you prefer. Please indicate your preferred method(s) of receiving copies of your tax return(s) below:

- I prefer to receive my tax return(s) in paper form – **Mailed via USPS**
- I prefer to **Pick Up** my tax return(s) in paper form from the office of DeVries + Associates
- I prefer to receive my tax return(s) in **electronic (PDF) form**.

We are offering the ability to securely receive signature documents and full copies of your tax returns via Citrix ShareFile this year. This secure electronic delivery platform includes the ability to e-sign required e-filing forms. You must provide unique email addresses for both spouses on a joint return. *Please complete the following information for e-delivery:*

Taxpayer Name: \_\_\_\_\_ Email: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Spouse Name: \_\_\_\_\_ Email: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

### **Refund Preference**

- I prefer to receive **check(s)** for my refund(s)
- Same** Direct Deposit Account as Last Year
- New Account (please fill in below or submit voided check or bank direct deposit printout):**

Routing # \_\_\_\_\_ Account # \_\_\_\_\_ Type of Account:      Checking       Savings