



DEVRIES + ASSOCIATES CPA

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2025 Tax Return Client Information

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

Name: _____ Spouse Name: _____

Current Mailing Address: _____

Did you Move After 1/1/25? No ☐ Yes ☐ If yes, date moved: _____

Any Dependent Changes (birth, no longer dependent, etc.) for 2025? (Submit copy of Social Security card for new child.)

Dependent Full Legal Name: _____ Date of Birth: _____ SSN: _____

Explanation/Details on Dependent Changes: _____

At any time during the year, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency?

☐ YES ☐ NO

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 TaxDome 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) – **PLEASE NOTE:** The IRS is transitioning to requiring electronic refunds. Refunds by check for 2025 may be delayed by 6 weeks or more
- ☐ **Same** Direct Deposit Account as Last Year (Confirm last 4 digits of account number here: _____)
- ☐ **New Account (please fill in below or submit voided check or bank direct deposit printout):**

Routing # _____ Account # _____ Type of Account: Checking Savings