



DEVRIES + ASSOCIATES CPA

2020 RAYBROOK ST SE, SUITE 201, GRAND RAPIDS, MI 49546 | PH: (616) 257-7950

www.devries.cpa / tax@devries.cpa

2023 Tax Return Client Information

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

Name: _____ Spouse Name: _____

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.

Please complete the following information for e-delivery:

Taxpayer Name: _____ Email: _____ Cell Phone: _____

Spouse Name: _____ Email: _____ Cell Phone: _____

Direct Deposit of Refunds

- 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