

Client Information Update

Taxpayer: _____ Spouse: _____

Email _____ Email _____

Phone: _____ Phone: _____

Address _____

City: _____ State: _____ Zip: _____

School District: _____ County: _____

Copies of Identification & Social Security card/ ITIN for self & spouse
 Scanned In

Interested in SmartVault Portal? Y N *Email Required

Bank Information:

Bank Name: _____

Routing # _____

Account # _____

Y N I Received the 3rd Stimulus Check Amount \$ _____

Y N I Donated to Charities in 2021 Amount \$ _____

Child Tax Credit

I DID opt out of the Child Tax Credit

I DID NOT opt out of the Child Tax Credit

Month: _____ Amount \$ _____ Month: _____ Amount \$ _____

Month: _____ Amount \$ _____ Month: _____ Amount \$ _____

Month: _____ Amount \$ _____ Month: _____ Amount \$ _____

****If received Letter-6419, please mail or drop off.***

Did you have/adopt a child/children this year? Y N

| Name | DOB | SSN | Relationship |
|------|-----|-----|--------------|
| | | | |
| | | | |