

**WEST & COMPANY CPA P.C.**  
**ANNUAL CLIENT PROFILE**

Today's date: \_\_\_\_\_

Legal Name: \_\_\_\_\_

SSN: \_\_\_\_\_

DOB: \_\_\_\_\_

Occupation: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

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

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

SSN: \_\_\_\_\_

DOB: \_\_\_\_\_

Occupation: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

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

Home phone: (If Preferred) \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Current Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

If we provide accounting services for your business, please provide the name of your business:

\_\_\_\_\_

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Please list any dependents

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_

Do any of your dependents go to daycare?      YES      NO

If yes, please attach a list of payments made per child, per facility.

**Have any of the following changes occurred since your last tax return?**

Marital Status Change?      YES      NO

If separated or divorced, we will need the separation agreement and/or divorce agreement.

Move to a New Address?      YES      NO

If yes, Date of Address Change: \_\_\_\_\_

If you purchased or sold a home this year, we need the settlement sheet. (Closing statement).

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Do you have an **HSA**?      YES      NO

If yes, please provide Form 1099-SA (Distributions) and Form 5498-SA (Contributions)

Did you make any **estimated payments** to the IRS or State?      YES      NO  
Please attach a list of these payments providing amounts paid and the date you paid.

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Did you have Marketplace health insurance during this tax year?   YES      NO  
If yes, you **must** provide Form 1095-A.

If it was not mailed to you; this can be obtained online by using the web address on the back of your insurance card. You need to register for a log in and from there you can print your documents.

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Do you own any foreign assets or crypto currency?      YES      NO  
If yes, please provide appropriate documentation.

Did you purchase anything online or out of state and did not pay sales tax?      YES      NO  
If yes, approximately what was the cost of those items? \_\_\_\_\_

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## DIRECT DEPOSIT

If you are entitled to a refund, would you like direct deposit?      YES      NO

Has your account information changed since your last return?      YES      NO

If yes to either of the above, please provide your current information below:

Bank Name: \_\_\_\_\_

Routing Number: \_\_\_\_\_

Account Number: \_\_\_\_\_

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Did you make any donations by check, cash, or card?      YES      NO

Please provide a donation receipt if applicable.

(Clothing, books, furniture, etc. are only accepted if you can itemize each donation.)

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*If you are a new client, please provide at least three (3) prior year's tax returns for our records.*

How did you hear about us? \_\_\_\_\_

If you were referred by a currently client(s), please provide their name so we may thank them:

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