



Client Information Update Form

<Primary Taxpayer Information>

First Name: _____ Last Name: _____

Is your Home address changed? **NO** **YES** (Please write your new address below.)

NEW Home Address:

Street: _____
City: _____ State: _____ Zip Code: _____

Is your phone number and email changed? **NO** **YES** (Please write your new phone number and email below.)

NEW Cell Ph: _____

NEW Email: _____

Is your residential status changed? **NO** **YES** (Please indicate your change.)

Nationality: _____

Residential Status (Check one.):

US Citizen US Permanent Resident Non-resident of US

US Resident with Visa – Type of Visa: _____

Is Your Driver's License information changed? **NO** **YES** (Please provide updates.)

Issued State: _____ Driver's License Number: _____

Issued Date (MM/DD/YYYY): _____ Expiration Date (MM/DD/YYYY): _____

Have you received or sold any digital assets (example: bit coins)? **NO** **YES** (Please explain below.)

Do you have any bank/security accounts in foreign countries? **NO** **YES**

If YES for the first time this tax year, please fill out FBAR information form.

If YES as same as last year, please fill out FBAR information form only with [Bank Name] [Account Number] [Maximum Amount in original foreign currency] to update.

<Spouse Information>

First Name: _____ Last Name: _____

Is your Home address changed? NO YES (Please write your new address below.)

NEW Home Address:

Street: _____

City: _____ State: _____ Zip Code: _____

Is your phone number and email changed? NO YES (Please write your new phone number and email below.)

NEW Cell Ph: _____

NEW Email: _____

Is your residential status changed? NO YES (Please indicate your change.)

Nationality: _____

Residential Status (Check one.):

US Citizen US Permanent Resident Non-resident of US

US Resident with Visa – Type of Visa: _____

Is Your Driver's License information changed? NO YES (Please provide updates.)

Issued State: _____ Driver's License Number: _____

Issued Date (MM/DD/YYYY): _____ Expiration Date (MM/DD/YYYY): _____

Have you received or sold any digital assets (example: bit coins)? NO YES (Please explain below.)

Do you have any bank/security accounts in foreign countries? NO YES

If YES for the first time this tax year, please fill out FBAR information form.

If YES as same as last year, please fill out FBAR information form only with [Bank Name] [Account Number] [Maximum Amount in original foreign currency] to update.

<Dependent Information>

Is there any updates for your dependents? No YES (Please explain below.)

Name of Dependent: _____

Updates (Example: Left home and in college dorm. Have some income.)

Name of Dependent: _____

Updates (Example: Left home and in college dorm. Have some income.)

Do you have any additional dependents (newborn baby/adapted baby/live-in relatives) this tax year?

NO YES (Please provide information below.)

First Name: _____ Last Name: _____

Middle Name: _____ Date of Birth (MM/DD/YYYY): _____

SSN/TIN: _____ Relationship: _____

First Name: _____ Last Name: _____

Middle Name: _____ Date of Birth (MM/DD/YYYY): _____

SSN/TIN: _____ Relationship: _____