



## 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.

## &lt;Spouse Information&gt;

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: \_\_\_\_\_