



CLIENT INTAKE FORM – TAX YEAR 2023

Upload Date _____ (please email maggie@franketax.com when you are finished uploading)

Name _____

Address _____

If you moved between states in 2023, please provide the date you moved: _____

Phone # _____

Email(s) _____

Filing Status:

- Single, Married Filing Jointly, Head of Household, Married Filing Separate, Qualifying Widower

Are there any changes in dependency status for 2023? _____

Questions / Notes:

(Office use only)

Preparer Notes: Completed

Refunds / Balance Due

If you receive a refund, which would you prefer?

- Direct Deposit Paper Check(s)

If you have a federal and/or state balance due, how would you like to make the payment?

- Direct Debit – April 15th, 2024 Paper Check(s)

If you have estimate payments for 2024, how would you like to make those payments?

- Direct Debit – withdrawn on due dates Paper Check(s)

Bank Account

To ensure the correct bank information is on file, please provide the following:

Type of account: Checking Savings

Routing Number _ _ _ _ _

Account Number _____

Completed Return

We will contact you once the return is complete. How would you like to sign for the return?

- In person – stop by our office to sign for your return
 DocuSign – sign electronically via email

How would you like to receive your copy of the final tax return?

- Printed – paper copy for your file cabinet
 Electronic – uploaded to your client portal, Revver
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