

Happy New Year! Tax season is upon us once again.

\*\*\*Please provide the following **required** information needed prior to **starting** your returns\*\*\*

**Contact Information**

Has any of your contact information changed? \*Yes No \* If yes, please provide the updated information:

**Bank Information**

Has your bank account changed since last year? \*Yes No \*If yes, please provide:

Your Bank Name \_\_\_\_\_

Your Account Number \_\_\_\_\_ OR Please provide a voided check.

Your Routing Number \_\_\_\_\_

**Untaxed Purchases**

Illinois is once again asking whether you purchased any items on the internet, from a catalog or while traveling out of state without paying sales tax. If you live outside of Illinois and your state also taxes assesses use tax, please be sure to answer these questions. Did you have any untaxed purchases in 2023? \*Yes No

\*If yes, please provide the amount of untaxed purchases: \$ \_\_\_\_\_

This amount will be multiplied by 6.25% for Illinois, in order to calculate the amount of use tax to be paid for the year.

**Digital Assets**

At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or financial interest in a digital asset)? Yes No

**Driver's License**

Changed in 2023 or 2024? Expired?  Please provide the new issue & expiration dates & changes below.

**Taxpayer**

**Spouse**

DL Number \_\_\_\_\_

DL Number \_\_\_\_\_

State of Issue \_\_\_\_\_

State of Issue \_\_\_\_\_

Issue Date \_\_\_\_\_

Issue Date \_\_\_\_\_

Expiration Date \_\_\_\_\_

Expiration Date \_\_\_\_\_

I thank you in advance for answering the above questions. I look forward once again to working with you this year!