

HHB RETURNING CLIENT QUICK UPDATE

Tax Year: _____

Office: ☐ Auburn ☐ Opelika

Delivery: ☐ SafeSend ☐ Paper

CONTACT INFORMATION

Taxpayer / Spouse name(s) _____

Phone / Email _____

Address (only if changed) _____

Driver's license (if new/renewed)

State ____ # _____ Issue date ____/____/____

Exp date ____/____/____

Best way to reach you: ☐ Email ☐ Phone ☐ Text

*REFUND- DIRECT DEPOSIT

The IRS is moving away from paper refund checks. Most refunds will be issued electronically, so accurate banking details help avoid delays.

Direct Deposit Required for Refunds

☐ Direct deposit ☐ I expect to owe / no refund expected

Direct deposit:

☐ Same as last year (ending in _____) ☐ New / changed

Routing # (9 digits)

_____ Account #: _____

Bank name / type

_____ ☐ Checking ☐ Savings

If you owe

Use this same account for IRS/state electronic payment: ☐ Yes ☐ No

Authorization: Signature _____ Date _____ (Optional) Attach voided check/bank letter

CHANGES SINCE LAST YEAR? (check only what applies)

☐ No changes

☐ New dependent(s)

☐ Moved

☐ Bought/sold a home

☐ Business or rental started/ended

☐ K-1 received

☐ Retirement distribution/rollover

☐ Marketplace insurance (1095-A)

☐ Unemployment (1099-G)

☐ Investments/crypto (1099-B)

☐ HSA/529 distribution

☐ Education/daycare expenses

☐ Filing status change

☐ Death: Date: _____

Details (only if needed): _____

MISSING DOCUMENTS?

NOTES / QUESTIONS

Office use: Received by/date _____ Estimated billing _____