



## On Point Tax & Accounting Client Organizer

PLEASE FILL OUT ALL INFORMATION FOR OUR RECORDS, EVEN IF IT REMAINS THE SAME AS LAST YEAR.

NAME(S): (TAXPAYER & SPOUSE)

\_\_\_\_\_

CURRENT ADDRESS:

\_\_\_\_\_

COUNTY OF RESIDENCE:

\_\_\_\_\_

PA ONLY: TOWNSHIP/BOROUGH:

\_\_\_\_\_

PHONE(S): (FOR TAXPAYER & SPOUSE)

\_\_\_\_\_

EMAIL(S): (FOR TAXPAYER & SPOUSE)

\_\_\_\_\_

OCCUPATION(S): (FOR TAXPAYER & SPOUSE)

\_\_\_\_\_

NEW CLIENTS ONLY: TAXPAYER

DOB: \_\_\_\_\_ SOCIAL SECURITY NUMBER: \_\_\_\_\_

NEW CLIENTS ONLY: SPOUSE

DOB: \_\_\_\_\_ SOCIAL SECURITY NUMBER: \_\_\_\_\_

DID YOU RETIRE IN 2022?

YES  NO

BEST WAY TO COMMUNICATE

CELLPHONE  EMAIL  HOME PHONE  TAXDOME PORTAL

FILING STATUS FOR 2022?

SINGLE  MARRIED FILING JOINTLY  MARRIED FILING SEPARATELY  
 QUALIFYING WIDOW(ER)  HEAD OF HOUSEHOLD

DID YOU MOVE DURING 2022?

YES  NO IF YES, DATE: \_\_\_\_\_

PREVIOUS ADDRESS: \_\_\_\_\_

DID YOU REFINANCE YOUR MORTGAGE IN 2022?

YES  NO IF YES, PROVIDE CLOSING DISCLOSURE

DEPENDENT INFORMATION:

**MUST PROVIDE PROOF OF RESIDENCY FOR EACH DEPENDENT YOU ARE CLAIMING**

CURRENT CLIENTS ONLY: LIST ALL CURRENT DEPENDENTS: \_\_\_\_\_

LIST ANY DEPENDENTS CLAIMED LAST YEAR THAT YOU ARE **NO LONGER CLAIMING**: \_\_\_\_\_

NEW CLIENTS: LIST ALL DEPENDENTS: (USE SEPARATE SHEET OR BACK IF ADDITIONAL LINES NEEDED)

CURRENT CLIENTS: LIST ALL NEW DEPENDENTS:

NAME: \_\_\_\_\_ DATE OF BIRTH: \_\_\_\_\_ SSN: \_\_\_\_\_

PROOF OF RESIDENCY YOU ARE PROVIDING:  SCHOOL RECORD  MEDICAL RECORD  OTHER

NAME: \_\_\_\_\_ DATE OF BIRTH: \_\_\_\_\_ SSN: \_\_\_\_\_

PROOF OF RESIDENCY YOU ARE PROVIDING:  SCHOOL RECORD  MEDICAL RECORD  OTHER

**BANK INFORMATION  
FOR DIRECT DEPOSIT**

BANK NAME: \_\_\_\_\_

(YOU MAY ALSO PROVIDE A COPY OF A VOIDED CHECK)

ROUTING NUMBER: \_\_\_\_\_ ACCOUNT NUMBER: \_\_\_\_\_

TYPE:  CHECKING  SAVINGS

DID YOU MAKE ANY FEDERAL OR STATE ESTIMATED TAX PAYMENTS?

YES  NO IF YES, PROVIDE LIST OF PAYMENTS BY DATE

DID YOU PURCHASE HEALTH INSURANCE THROUGH THE HEALTH EXCHANGE?

YES - NEED 1095A FORM  NO

DID YOU RECEIVE, SELL, EXCHANGE OR OTHERWISE DISPOSE OF ANY FINANCIAL INTEREST IN ANY VIRTUAL CURRENCY ?

YES  NO