

*Blue Water Tax Service, LLC*  
5460 Lapeer Rd.  
Kimball, MI 48074  
810-982-2236  
[bluewatertax@comcast.net](mailto:bluewatertax@comcast.net)

**New Clients must fill out all that apply along with a copy of the previous year tax return. Returning client, please note any changes in the following:**

Taxpayer Name: \_\_\_\_\_ DOB: \_\_\_\_\_

Phone number: \_\_\_\_\_ Email: \_\_\_\_\_

Address: \_\_\_\_\_

SSN: \_\_\_\_\_ Check One:  Married  Single  MFS  HOH

If you chose Married or MFS:

Spouse Name: \_\_\_\_\_ DOB: \_\_\_\_\_

Address (If different): \_\_\_\_\_

SSN: \_\_\_\_\_ Phone number: \_\_\_\_\_

Please list any dependents to claim:

Name (as seen on SS Card)	SSN	DOB	College Y/N	Child Care Y/N
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Please answer the following (additional information may be needed):

- Do you own your home? **Y/N** If yes, please include property tax bills
- Rent? **Y/N** Monthly amount \_\_\_\_\_ Paid to whom \_\_\_\_\_
- Have you refinanced, bought, or sold your home? **Y/N**
- Do you own any business or rentals? **Y/N**
- Do you have health insurance through the Marketplace? **Y/N** **\*Must have form 1095-A**
- Any foreign bank accounts? **Y/N** Any virtual currency (cryptocurrency/bitcoin)? **Y/N**
- Did you receive any unemployment? **Y/N** Include 1099G
- Any interest or dividends from checking or savings accounts? **Y/N** Any stocks? **Y/N**
- Any 401K Withdrawals? **Y/N** Include 1099R
- Did you receive a Stimulus check? **Y/N** Amount for the 1<sup>st</sup> \_\_\_\_\_ 2<sup>nd</sup> \_\_\_\_\_

**If you answer Yes to either of the following or have any changes to your direct deposit, please provide your banking information:**

- If your return reflects a refund would you like direct deposit? **Y/N**
- If your return reflects a balance due, would you like it direct debited? **Y/N**

Bank Name: \_\_\_\_\_ Account Number: \_\_\_\_\_

**\*\*Please refer to our checklist for any further documents that you may need.**