NEW CLIENT INFORMATION SLIP

(Please Provide a Copy of Last Year's Return)

(TP)Taxpayer Name: ___________________ (SP)Spouse Name: _____________________

Date of Birth: _________________________ Spouse (DOB): ________________________

SSN #: _______________________________ Spouse SSN #: _________________________

Occupation: __________________________ Spouse Occupation: ___________________

Taxpayer Email:________________________ Spouse Email:_________________________

TP Drivers License#_____________________ SP Drivers License#____________________

TP DL Issue Date:_______________________ SP DL Issue Date:______________________

TP DL Expiration Date:___________________ SP DL Expiration Date:__________________

Client Address/Phone Number:

Street: ______________________________ TP Phone #:__________________________

City, State, Zip: _______________________ SP Phone #:__________________________

Dependent Information (Please provide copies of the Social Security cards for Taxpayer, Spouse and ALL dependents)

*****Please also include a Medical,School, and/or Other Document verifying your dependents address*****

Name: ___________________________ DOB: ________ SSN#: ___________________

Name: ___________________________ DOB: ________ SSN#: ___________________

Name: ___________________________ DOB: ________ SSN#: ___________________

Name: ___________________________ DOB: ________ SSN#: ___________________

Bank Information (Direct Deposit/Direct Pay) (or attach a copy of a voided check)

Bank Name:____________________________ Checking/Savings (Please Circle)

Routing #: _____________________________ Account# ______________________

Questions

Please check the appropriate box and include all necessary details and documentation.

	Yes	No
Personal Information		
Did your marital status change during the year?	☐	☐
If yes, explain: ____		
Did you live separately from your spouse during the last six months of the year?	☐	☐
Do you have a separate decree, instrument, or agreement and are not living in the same household by the end of the year?	☐	☐
Did your address change from last year?	☐	☐
Can you be claimed as a dependent by another taxpayer?	☐	☐
Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account number change for existing bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year?	☐	☐
Do you, your spouse (if applicable), and any dependents have a taxpayer identification number (SSN, ITIN, or ATIN)?	☐	☐
Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, attach the IRS letter for filing returns in 2022.	☐	☐
Did you reside in or operate a business in a Federally declared disaster area?	☐	☐
The Federally declared disaster areas include victims of hurricanes, tropical storms, floods, as well as wildfires.		
COVID-19 Information		
Did you receive State and Local Fiscal Recovery Funds (SLFR) under a program to support those negatively impacted by the COVID-19 pandemic for helping you with your mortgage insurance and/or home purchases, such as funds to pay some or all of the down payment and closing costs associated with your purchase of a home?	☐	☐
Did you receive a Paycheck Protection Program (PPP) loan?	☐	☐
If yes, did you apply for Paycheck Protection Program (PPP) loan forgiveness?	☐	☐
Are you a telecommuting employee that was required to "shelter in place" due to local COVID-19 protocols while working in a state that was not your home state?	☐	☐
Did you pay emergency sick leave wages to a household employee?	☐	☐
Did you pay emergency family leave wages to a household employee?	☐	☐
Did you receive any special unemployment benefits or compensation under the Coronavirus Relief Act during the year?	☐	☐
Dependent Information		
Were there any changes in dependents from the prior year?	☐	☐
If yes, explain: ____		
Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of $2,300?	☐	☐
Do you have dependents who must file a tax return?	☐	☐
Did you provide over half the support for any other person(s) other than your dependent children during the year?	☐	☐
Did you pay for child care while you worked, looked for work, or while a full-time student?	☐	☐
Is there any other person(s) who lived with you more than half the year but not claimed by you last year?	☐	☐
Did you pay any expenses related to the adoption of a child during the year?	☐	☐

If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?	☐	☐
Did any dependents receive an Identity Protection PIN (IP PIN) from the IRS or have they been a victim of identity theft? If yes, attach the IRS letter for use during 2022	☐	☐

Purchases, Sales and Debt Information

Did you start a new business or purchase rental property during the year?	☐	☐
Did you sell, exchange, or purchase any assets used in your trade or business?	☐	☐
Did you acquire a new or additional interest in a partnership or S corporation?	☐	☐
Did you sell, exchange, or purchase any real estate during the year?	☐	☐
Did you purchase or sell a principal residence during the year?	☐	☐
Did you foreclose or abandon a principal residence or real property during the year?	☐	☐
Did you acquire or dispose of any stock during the year?	☐	☐
Did you take out a home equity loan this year?	☐	☐
Did you refinance a principal residence or second home this year?	☐	☐
Did you sell an existing business, rental, or other property this year?	☐	☐
Did you lend money with the understanding of repayment and this year it became totally uncollectable?	☐	☐
Did you have any debts canceled or forgiven this year, such as a home mortgage or student loan(s)?	☐	☐
Did you purchase a qualified plug-in electric drive vehicle this year?	☐	☐

Income Information

Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer?	☐	☐
Did you receive any income from property sold prior to this year?	☐	☐
Did you receive any unemployment benefits during the year?	☐	☐
Did you receive any disability income during the year?	☐	☐
Did you receive any Medicaid waiver payments as difficulty of care during the year?	☐	☐
Did you receive tip income not reported to your employer this year?	☐	☐
Did any of your life insurance policies mature, or did you surrender any policies?	☐	☐
Did you receive any awards, prizes, hobby income, gambling or lottery winnings?	☐	☐
Did you receive any income considered to be nonemployee compensation?	☐	☐
Did you receive a Form 1099-K, 1099-MISC, 1099-NEC, or other income statement for work done in what is commonly referred to as the "gig" economy?	☐	☐
Do you expect a large fluctuation in income, deductions, or withholding next year?	☐	☐
Did you have any sales or other exchanges of digital assets (including from an airdrop or a hard fork, or used digital assets to pay for goods or services?	☐	☐

Retirement Information

Are you an active participant in a pension or retirement plan?	☐	☐
Did you receive any Social Security benefits during the year?	☐	☐
Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?	☐	☐
If yes, were any withdrawals due to a Federally declared disaster?	☐	☐
If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2022?	☐	☐
Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?	☐	☐
Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?	☐	☐

Education Information

Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year?	☐	☐
Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent?	☐	☐
Did anyone in your family receive a scholarship of any kind during the year?	☐	☐
If yes, were any of the scholarship funds used for expenses other than tuition, such as room and board?	☐	☐
Did you make any withdrawals from an education savings or 529 Plan account?	☐	☐
If yes, were any of these withdrawals rolled over into an ABLE (Achieving a Better Life Experience) account?	☐	☐
Did you make any contributions to an education savings or 529 Plan account?	☐	☐
Did you pay any student loan interest this year?	☐	☐
Did you cash any Series EE or I U.S. Savings bonds issued after 1989?	☐	☐
Would you like a worksheet to aid in the completion of a Free Application for Federal Student Aid (FAFSA) with the U.S. Department of Education?	☐	☐

Health Care Information

Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for your family? "Your family" for health care coverage refers to you, your spouse if filing jointly, and anyone you can claim as a dependent.	☐	☐
Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act?	☐	☐
Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act and share a policy with anyone who is not included in your family?	☐	☐
Did you make any contributions to a Health savings account (HSA) or Archer MSA?	☐	☐
Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year?	☐	☐
Did you pay long-term care premiums for yourself or your family?	☐	☐
Did you make any contributions to an ABLE (Achieving a Better Life Experience) account?	☐	☐
Did you receive any withdrawals from an ABLE (Achieving a Better Life Experience) account?	☐	☐
If you are a business owner, did you pay health insurance premiums for your employees this year?	☐	☐

Itemized Deduction Information

Did you incur a casualty or theft loss or any condemnation awards during the year?	☐	☐
If yes, did the loss occur in a Federally declared disaster area?	☐	☐
Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?	☐	☐
Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)?	☐	☐
If yes, please provide evidence such as a receipt from the donee organization, a canceled check, or record of payment, to substantiate all contributions made.		
Did you donate a vehicle or boat during the year?.	☐	☐
Did you pay real estate taxes for your primary home and/or second home?	☐	☐
Did you pay any mortgage interest on an existing home loan?	☐	☐
Did you incur interest expenses associated with any investment accounts you held?	☐	☐
Did you make any major purchases during the year (cars, boats, etc.)?	☐	☐
Did you make any out-of-state purchases (by telephone, internet, mail, or in person) for which the seller did not collect state sales or use tax?	☐	☐

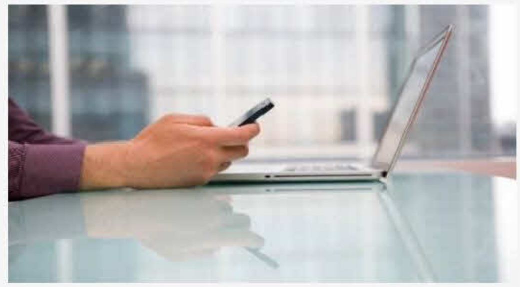
Miscellaneous Information

Did you make gifts of more than $16,000 to any individual?	☐	☐
Did you utilize an area of your home for business purposes?	☐	☐

Did you engage in any bartering transactions?	☐	☐
Did you retire or change jobs this year?	☐	☐
Did you incur moving costs because of a permanent change of station as a member of the Armed Forces on active duty?	☐	☐
Did you pay any individual as a household employee during the year?	☐	☐
Did you make energy efficient improvements to your main home this year?	☐	☐
Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?	☐	☐
Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country?	☐	☐
Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?	☐	☐
Did you receive correspondence from the State or the IRS?	☐	☐
If yes, explain: ____		
Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due?	☐	☐
Do you want to designate $3 to the Presidential Election Campaign Fund? If you check yes, it will not change your tax or reduce your refund.	☐	☐

Secure document exchange portal

Register for Client Center



Dear Valued Client,

We now use **Client Center**, a secure web portal, to easily exchange files and communications (tax questionnaire, supporting documents, and returns). This is a web portal that you log in to, with helpful features and even a mobile app option. Use the following steps and resources to get started.

! You will receive a **Registration email** with the subject line "Dalton CPA, LLC – Register Your Client Center Account" from the address no-reply@onvio.com.

STEPS TO COMPLETE:

- Click the orange *REGISTER NOW* button in the middle of the registration email. You will create a login using an email address, and also a password.
- Remember the email address you use for the login. If you forget your password, you can click a link below the login area to Reset Password via email on the Onvio Client Center login page.
- Create a bookmark or favorite on your web browser for the https://www.daltoncpallc.com/client-login page.

Watch this 3 Minute Video....to review how to register, update your profile, and use the portal's features.

ADDITIONAL RESOURCES:

Interested in the Mobile App? You can search "Onvio Client Center" on your phone's app store.

Add an additional level of security on your portal login by setting up Multi-Factor Authentication!

Help & How-To Center

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Client Center mobile app

The Client Center mobile app is available as a free download for Apple and Android devices. The app offers you on-the-go access to your Client Center documents and tasks. To locate the Client Center mobile app in the App Store or Google Play store, search for **Onvio Client Center**.

Note: You can download the Client Center mobile app to Apple devices that run iOS 11.0 or higher and to Android devices that run Android OS 5.0 or higher.

The Client Center mobile app allows you to do the following.

Manage your documents

- Save documents from other apps to Client Center using the Send or Share feature of your Apple or Android device.
- Scan and upload documents using the camera on your mobile device.
- Send documents to others by using document links, rather than using less-secure email attachments. To send a document link, open the document and then press the Share button (iOS) (Android). Add the recipient's email address, and then choose when the link will expire (optional) and add a password (optional). If you add a password, share it with the recipient so they can enter it after they receive the document link and click to open it. When you're finished, press Send.

Perform tasks assigned by your accountant

eSignature and Approval tasks

- When your accountant assembles documents or actionable items and sends them to Client Center, these items appear as eSignature or Approval items on your Tasks screen To-Do list.
- As you complete each task, it moves to the Completed list in the Client Center app and your accountant is notified.

Tax Questionnaire tasks

1. First, you must update and verify household information. Once that information is marked Complete, the questionnaire becomes available on your To-Do list.
2. Complete the items that are applicable to you (e.g., received W-2, changed jobs, was a full-time student.
3. Once lifestyle and employment items are marked Complete, your To-Do list is populated with new tasks based on your completed questionnaire items.
4. As you complete each task, it moves to the Completed list and your accountant is notified.

Upload tasks

- Tasks are added, based on your Questionnaire answers.
- You can upload documents directly to a task.
- General upload tasks have steps that can be removed, marked Complete, or marked Does Not Apply (with a comment). The steps can be marked Complete at any time, with or without documents attached to them.
- As you complete each task, it moves to the Completed list and your accountant is notified.
- Each step allows you to take other actions and view additional information.