



TROWBRIDGE

International Tax. Simplified.

This checklist represents STEP 1 of the tax season [Step By Step Process](#).

Taxpayer 1

Taxpayer 2

First name and middle initial

Last name

If you are a returning client please check the box if there are no changes to your information or alternatively update the information below that has changed since your last tax return. Once you have reviewed and updated you can move on to the Step 2 Tax Checklist of the [Step By Step Process](#).

Personal Information

Social Security Number (ITIN)

Date of birth (MM/DD/YYYY)

US Presidential Campaign
Fund contribution (\$3)

Occupation

Email Address

Telephone - Home

Telephone - Work

Telephone - Cell

Mailing address to be reported on tax
return

Did you move during the year?

Change in Personal Situation During the Year

Marital status

Same-sex partner?

Did your marital status change during the year?

State the date of change (MM/DD/YYYY)

What is your filing status for US tax purposes?

Citizenship and Residency

Taxpayer 1

Taxpayer 2

Are you a US citizen or Greencard holder? (Citizen, Greencard, or Neither)

Did you relocate to or from the US during 2023?

Did you make any personal or work related trips to the US in the year?

If **YES**, please fill in the [2023 Travel Calendar](#)

Did you receive a notice from the IRS with respect to identity theft?

If applicable, what other country are you a citizen of?

An Identity Protection PIN (IP PIN) is a six-digit number is issued ANNUALLY to those taxpayers who have requested or require it. IF you have one or have had one in the past, the IP PIN is required in order for us to efile your return. It helps IRS verify your identity when you file your electronic or paper tax return and reduces delays in processing.

If applicable, what other country are you a citizen of?

Dependants

Did you have any dependants in 2023?

Dependant 1

Dependant 2

Dependant 3

Dependant 4

Name

Relationship

Social Security Number/ITIN

Date of birth (MM/DD/YYYY)

Post-Secondary Student

Direct Deposit Information

Do you wish to change or set up direct deposit for income tax refunds?

US Account Information

Please complete the following to change your US bank account information or request direct deposit for your income tax refund with the Internal Revenue Service and/or state revenue department.

Type of account

Financial institution

Routing number

Do you want to use this account for direct debit of federal or state balance(s) due where such automatic withdrawal is available?

Account number