



Derland G. Bahr, CPA  
New Client Drop Off

Today's Date: \_\_\_\_\_

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Spouse Phone (if applicable): \_\_\_\_\_

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

City, State Zip: \_\_\_\_\_

Email: \_\_\_\_\_

Spouse Email (if applicable): \_\_\_\_\_

Taxpayer name: \_\_\_\_\_ Social Security # \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Occupation: \_\_\_\_\_

DL# \_\_\_\_\_ State: \_\_\_\_\_ Iss Date: \_\_\_\_\_ Exp Date: \_\_\_\_\_

Spouse Name (if applicable): \_\_\_\_\_ Social Security # \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Occupation \_\_\_\_\_

DL# \_\_\_\_\_ State: \_\_\_\_\_ Iss Date: \_\_\_\_\_ Exp Date: \_\_\_\_\_

Filing Status: Single    Married Filing Jointly    Married Filing Separately    Head of Household

Dependent Name(s): \_\_\_\_\_ Relationship: \_\_\_\_\_ Social Security # \_\_\_\_\_ Date of Birth: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

1. Was anybody covered through the **Marketplace (Obamacare)**? (Yes or No) If **YES**, please provide **form 1095A**.
2. Did you receive, sell, exchange, or have any financial interest in **cryptocurrency** (e.g., bitcoin)? (Yes or No).
3. Do any of the following apply? (yes or no)
  - a. Teacher Deduction (yes or no) (Only for K-12 teachers) \_\_\_\_\_
  - b. IRA contributions (does **NOT** include retirement plans thru work) (yes or no)  
Taxpayer contribution \$ \_\_\_\_\_ Spouse contribution \$ \_\_\_\_\_ (Roth or Traditional)
  - c. Out-of-pocket College expenses for you or dependents? (yes or no) If **yes**, we need form(s) **1098-T**
  - d. Student Loan Interest paid in 2023? (yes or no) If **yes**, we need form **1098-E**
  - e. Home energy improvements? (yes or no) If **yes**, please provide information.
  - f. Purchased Qualifying Electric Vehicle or Fuel Cell Vehicle? (yes or no) If **yes**, please provide information.
  - g. Other: \_\_\_\_\_

**Direct Deposit/Direct Debit:**

Bank Name                      Checking or Savings                      Routing #                      Account #  
\_\_\_\_\_  
\_\_\_\_\_

**Additional Info:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_