



**UPBLACK & ASSOCIATES CPA**

## Client Information Update 2016 Tax Year

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

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

\_\_\_\_\_

**Home Phone:** \_\_\_\_\_

**Cell Phone:** \_\_\_\_\_

**Work Phone:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

1) Is your Bank Information for Direct Deposit same as last year?

NO , COMPLETE BELOW:

YES, Skip to next question

**Bank Name:** \_\_\_\_\_

**Bank ABA #** \_\_\_\_\_

**Bank Account #** \_\_\_\_\_

2) Would you like to receive text message reminders?  YES  NO

3) Would you like to receive the copy of your Tax Return electronically?  YES  NO

4) Can we send you tax updates via E-mail?  YES  NO

### **Health Insurance:**

1) Did everyone in your household have qualified health insurance for all 12 months?

YES, FULL YEAR

YES, PARTIAL YEAR

NO

2) Did you receive form 1095 or Health Insurance Form?

YES

NO

3) Did any household member share a Marketplace policy with someone else?

YES

NO