

**GRANITE MOUNTAIN TAX SERVICE**  
**Client Interview Sheet TY2023**

Client #

Taxpayer

Spouse

Name(s) \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State/ZIP \_\_\_\_\_

Soc. Sec. # \_\_\_\_\_

Phone # \_\_\_\_\_

Email \_\_\_\_\_

Occupation \_\_\_\_\_

**Dependents**

Name	Relationship	Birthday	SSN
		/ /	- -
		/ /	- -
		/ /	- -

Direct Deposit  Y  N Bank Name \_\_\_\_\_

Acct Type: Check/Sav Routing # \_\_\_\_\_ Acct # \_\_\_\_\_

During the year did you receive (as a reward, award, or payment) or sell, exchange, gift, or otherwise dispose of a digital asset (crypto currency, NTF, etc.)? Y N

Do you own any foreign assets (bank account, trust, business, or property)? Y N

Did you live or earn income in another state for any part of the year? Y N

Are you interested in making a tax credit donation to a school and/or charity? Y N

Did everyone on the return have health insurance for the entire year? Y N

Did you obtain health insurance through the health care marketplace? Y N

Did you receive any unemployment during the year? Y N

Did you receive a 1099-G for gambling winnings? Y N

To the best of my knowledge the information above is correct and accurate for the preparation of my tax return.

Client Signature \_\_\_\_\_

Date \_\_\_\_\_