

2022 Intake – Due Diligence Questions

- Did your address change during 2022? Yes / No ****Please provide updated information**
- Has your bank account information changed during 2022? Yes / No
- Did you receive a Six-digit Identity Protection PIN from the IRS? Yes / No
- Has your marital status changed? Yes / No **Date of Marriage OR Divorce ____ / ____ / ____
- Have your dependents changed? Yes / No **ADD ____ / REMOVE ____ Dependent
- Did you purchase an Electric Vehicle? Yes / No **Make ____ Model ____ **VIN Required**
- Do you or your spouse have signature authority on any foreign bank/financial accounts? Yes / No
- Did you or your spouse have any involvement with cryptocurrency/virtual currency? Yes / No
- Do you or your spouse have health insurance thru the Healthcare.gov Marketplace? Yes / No

**If your driver's license expired in 2022 we will need a current copy with new expiration date