

## 2023 Intake – Due Diligence Questions

- Did your address change during 2023? Yes / No **\*\*Please provide updated information**
- Has your bank account information changed during 2023? Yes / No
- Did you receive a Six-digit Identity Protection PIN from the IRS? Yes / No
- Has your marital status changed? Yes / No
- Have your dependents changed? Yes / No **\*\*ADD \_\_\_\_ / REMOVE \_\_\_\_ Dependent**
- Did you purchase an Electric Vehicle (new or used)? Yes / No
- Did you have any qualified energy efficiency improvements installed during 2023 (i.e. Exterior Doors, Windows, Insulation, Central A/C Units, etc.)? Yes / No **\*\*Receipts must be provided**
- 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 crypto currency/virtual currency/digital assets? Yes / No
- Do you or your spouse have a marketplace health insurance plan through HealthCare.gov? Yes / No

**\*\*If your driver's license expired in 2023, we will need a current copy with new expiration date**

CELL PHONE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

**Please indicate how you prefer to be contacted:**

Phone \_\_\_\_\_ or Email \_\_\_\_\_