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General Information Statement

Certain states allow non-itemizers to deduct some charitable donations. Please fill in the amounts or \$0.

Cash Contribution \_\_\_\_\_

Non Cash Contribution \_\_\_\_\_

At any time during 2023, did you or your spouse a) receive (as a reward, award, or payment for property or services); or b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? For example, Cryptocurrency.

YES \_\_\_\_\_ NO \_\_\_\_\_

Did you, your spouse or any dependent receive insurance through the marketplace?

YES \_\_\_\_\_ NO \_\_\_\_\_

Did your address change since last year's return? If so, what is your new address?

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Please provide your bank information if it has changed from the previous year, or you are a new client.

Router \_\_\_\_\_ Account Number \_\_\_\_\_

Any major changes in your life in 2023 such as:

Marriage, divorce, birth of a child, death of a dependent or spouse? If so, please list below.

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Taxpayer Name \_\_\_\_\_

Taxpayer Signature \_\_\_\_\_