

## 2025 Intake – Due Diligence Questions

- Did your address change during 2025? Yes / No **\*\*Please provide updated information**
- Has your bank account information changed during 2025? 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 a NEW Vehicle in 2025? Yes / No
- Did you have any qualified energy efficient home improvements installed during 2025 (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 cryptocurrency/virtual currency/digital assets? Yes / No
- Did you or your spouse have health insurance through Georgia Access or Healthcare.gov Marketplace? Yes / No

**\*\*If your driver's license expired or changed in 2025; we will need a current copy with new updated information**

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

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

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

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