Client Intake Form-Personal

Client Information:

Taxpayer Name:____

Spouse's Name (if applicable):____________________________________

Taxpayer's SSN:___________________ Job Title:_______________________

Date of Birth:____________ Phone Number:_______________________

Spouses' SSN:_____________________Job Title:________________________

Date of Birth:____________ Phone Number:_______________________

Home Address:____

____

Email Address you prefer to use for primary contact from our office:___________________

Secondary Email Address:________________________

Number of W2's:________ Number of 1099's:________ Number of States:________

If you have dependents, please list below:

Name:____________________________ Date of Birth:__________
SSN:_________________

Name:____________________________Date of Birth:__________

SSN:_________________

Name:____________________________Date of Birth:__________

SSN:_________________

Name:____________________________Date of Birth:__________

SSN:_________________

How would you like your refund to be sent to you?

- Direct Deposit
- Mailed Check

If you would like to use direct deposit, please provide a voided check and fill in your bank information below:

Bank Name:________________________ Routing Number:_____________________

Account Number:______________________

Checklist of Documents Needed to Prepare Your Return:

- W2/1099
- Investment Statements
- Child Care Expenses
- Mortgage Interest
- Real Estate Tax Information (bought or sold real estate)
- Charitable Contributions
- Energy Efficient Home Improvement Information
- 1098-T (Tuition Statement)
- Student Loan Interest Statement
- Business Documents
- K1 (if applicable)
- Rental Property Information
- Farm Income Expenses
- Installment Sale Information
- 1095-A (for medical coverage)
- 1099-R (Retirement)
- Teacher Expenses
- Active Military Expenses (moving, etc.)
- Unemployment Statements
- Foreign Income
- Social Security Income
- Adoption Expenses
- Oil & Gas Investment
- Alimony Received
- At Home Office Expenses
- Any tax notices received from Federal or State offices