

NEW CLIENT INFORMATION

Please complete the following information sheet and bring it, along with a copy of your last year's tax return, to your meeting.

Taxpayer name and social security number:

Spouse name and social security number:

Address: _____

Filing Status:

Single Married Head of Household or Qualifying Widow(er)

Number of dependents: _____ Please list their:

Name, social security number, relationship & number of months in home

We may contact you at:

Phone _____ Email _____

Would you like your return e-filed _____ or do you wish to mail it _____

If you receive a refund, would you like it to be direct deposited Yes No

If yes, we will need your bank routing number _____

and account number _____