

# CLIENT INFORMATION SHEET

## CLIENT INFO

NAME: \_\_\_\_\_ SSN: \_\_\_\_-\_\_\_\_-\_\_\_\_ DOB: \_\_\_\_\_

SPOUSE: \_\_\_\_\_ SSN: \_\_\_\_-\_\_\_\_-\_\_\_\_ DOB: \_\_\_\_\_

ADDRESS: \_\_\_\_\_ ZIP: \_\_\_\_\_

FILING STATUS (Circle one): M S J HOH QW

OCCUPATION: \_\_\_\_\_ TYPE OF REFUND DESIRED: Direct Deposit Paper Chk

PHONE: (\_\_\_\_) \_\_\_\_\_ WORK: (\_\_\_\_) \_\_\_\_\_ CELL\*: (\_\_\_\_) \_\_\_\_\_

DL#: \_\_\_\_\_ STATE: \_\_\_\_\_ EMAIL: \_\_\_\_\_

Bank Name: \_\_\_\_\_ Routing #: \_\_\_\_\_ Acct #: \_\_\_\_\_

## DEPENDENT INFO

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_ REL: \_\_\_\_\_

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_ REL: \_\_\_\_\_

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_ REL: \_\_\_\_\_

## EMPLOYMENT INFO

EMPLOYER: \_\_\_\_\_ WAGES: \$ \_\_\_\_\_

EMPLOYER: \_\_\_\_\_ WAGES: \$ \_\_\_\_\_

EMPLOYER: \_\_\_\_\_ WAGES: \$ \_\_\_\_\_

BUYING A HOME: YES/NO

OWE FOR STUDENT LOANS: YES/NO

OWE CHILD SUPPORT: YES/NO

EYECARE: \_\_\_\_\_

DENTAL: \_\_\_\_\_

MORTGAGE INT: \_\_\_\_\_

TITHES/OFFERING: \_\_\_\_\_

STUDENT LOAN INT: \_\_\_\_\_

PROF DUES: \_\_\_\_\_

OTHER: \_\_\_\_\_

OTHER: \_\_\_\_\_

I give permission for my taxes to be processed and I understand I am liable for any/all excessive costs that may be associated with preparation of my taxes, which must be paid immediately. (Initial here) \_\_\_\_\_

I give permission for KC Financial Services to file my taxes electronically. (Initial here) \_\_\_\_\_

I hereby state that the above-mentioned information is true and correct to the best of my knowledge and recollection.

\*By providing your cell phone number you are giving KCF permission to send important messages via text.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Spouse Signature: \_\_\_\_\_

Date: \_\_\_\_\_

# SELF-EMPLOYED INFORMATION SHEET

## CLIENT INFO

NAME: \_\_\_\_\_ SSN: \_\_\_\_-\_\_\_\_-\_\_\_\_ DOB: \_\_\_\_\_  
SPOUSE: \_\_\_\_\_ SSN: \_\_\_\_-\_\_\_\_-\_\_\_\_ DOB: \_\_\_\_\_  
ADDRESS: \_\_\_\_\_ ZIP: \_\_\_\_\_  
FILING STATUS (Circle one): S MFJ MFS HOH WIDOWER  
OCCUPATION: \_\_\_\_\_ TYPE OF REFUND DESIRED: Direct Deposit Paper Chk  
PHONE: (\_\_\_\_) \_\_\_\_\_ WORK: (\_\_\_\_) \_\_\_\_\_ CELL: (\_\_\_\_) \_\_\_\_\_  
DL#: \_\_\_\_\_ STATE: \_\_\_\_\_ EMAIL: \_\_\_\_\_

## DEPENDENT INFO

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_ REL: \_\_\_\_\_  
NAME: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_ REL: \_\_\_\_\_  
NAME: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_ REL: \_\_\_\_\_

## BUSINESS INFO

NAME: \_\_\_\_\_ EIN: \_\_\_\_-\_\_\_\_-\_\_\_\_  
ADDRESS: \_\_\_\_\_ CITY: \_\_\_\_\_ ST: \_\_\_\_\_ ZIP: \_\_\_\_\_  
GROSS RECEIPTS: \$ \_\_\_\_\_  
ADVERTISING: \_\_\_\_\_ LEGAL EXPENSES: \_\_\_\_\_ REPAIRS/MAINT: \_\_\_\_\_  
INTEREST: \_\_\_\_\_ RENT/LEASE: \_\_\_\_\_ EQUIPMENT: \_\_\_\_\_  
INSURANCE: \_\_\_\_\_ SUPPLIES: \_\_\_\_\_ TRAVEL EXPENSES: \_\_\_\_\_  
CELL EXPENSES: \_\_\_\_\_ VEHICLE EXPENSES: \_\_\_\_\_ UTILITIES: \_\_\_\_\_  
MILEAGE/BUS: \_\_\_\_\_ TAX/LICENSE: \_\_\_\_\_ INTERNET: \_\_\_\_\_  
MILEAGE - OTHER: \_\_\_\_\_ COMMISSION: \_\_\_\_\_ START-UP EXPENSES: \_\_\_\_\_  
MILEAGE - COMM: \_\_\_\_\_ EMPLOYEE WAGES: \_\_\_\_\_ OFFICE EXPENSES: \_\_\_\_\_  
VENDOR BOOTHS: \_\_\_\_\_ EYECARE: \_\_\_\_\_ DENTAL: \_\_\_\_\_  
PROPERTY TAX: \_\_\_\_\_ TITHES/OFFERING: \_\_\_\_\_ UNION DUES: \_\_\_\_\_  
PROFESSIONAL DUES: \_\_\_\_\_ OTHER: \_\_\_\_\_ OTHER: \_\_\_\_\_  
BUYING A HOME: YES/NO OWE FOR STUDENT LOANS: YES/NO OWE CHILD SUPPORT: YES/NO

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I give permission for KC Financial Services to file my taxes electronically. (Initial here) \_\_\_\_\_

I hereby state that the above-mentioned information is true and correct to the best of my knowledge and recollection.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Spouse Signature: \_\_\_\_\_ Date: \_\_\_\_\_