



CLIENT INFO

NAME: _____ SSN: _____ - _____ - _____

DATE OF BIRTH: ____/____/____

ADDRESS: _____

CITY: _____ STATE _____ ZIP _____

CELL PHONE NUMBER: _____ HOME: _____

EMAIL: _____ @ _____ REFERRED BY: _____

CHECK ONE: W-2 EMPLOYEE _____ SELF EMPLOYED _____

FILING STATUS: circle one

SINGLE

MARRIED FILING JOINT

WIDOW

MARRIED FILING SEPARATE

HEAD OF HOUSEHOLD

ARE YOU BUYING A HOME? YES/NO OWE STUDENT LOANS? YES/NO OWE CHILD SUPPORT? YES/NO

DO YOU HAVE ANY SCHEDULED A ITEMIZED DEDUCTIONS? YES/NO

NEXT OF KIN: NAME _____ PHONE _____

REFUND AMOUNT LAST YEAR \$ _____

I, _____, hereby state that the foregoing information is true and correct to the best of my knowledge and recollection.

SIGNATURE: _____ DATE _____

SPOUSE: _____ DATE _____

