

**NEW CLIENT(S)?**  YES  NO

<u>Taxpayer</u>	<u>Spouse</u>
First Name: _____	First Name: _____
Middle Initial: _____ Suffix: _____	Middle Initial: _____ Suffix: _____
Last Name: _____	Last Name: _____
Social Security Number: _____	Social Security Number: _____
Date of Birth: _____	Date of Birth: _____
Occupation: _____	Occupation: _____
Company/Base _____	Company/Base _____
Cell Phone: _____	Cell Phone: _____
Home Phone: _____	Home Phone: _____
E-mail: _____ <small>(Important for file status updates/general communications.)</small>	E-mail: _____ <b>*None of your personal information is sold or shared.</b>

**Filing Address (for IRS residency purposes):**  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

**Mailing Address if Different (for us to send your copy of the tax return and invoice):**  
 \_\_\_\_\_

Dependents:					Full time student? Disabled (yes/no)?
Full Name	Social Security #	DOB	Relationship		

**Filing Status:**  
 Single     Married Filing Jointly     Married Filing Separately     Head of Household

**Insurance Questions:** Please circle one

Did **you** have health insurance through the Affordable Care Act, or An Employer for all 12 months of 2021? (ACA) (Employer) (None)

Did **your spouse** have health insurance through the Affordable Care Act, or An Employer for all 12 months of 2021? (ACA) (Employer) (None)

Did **your dependents** have health insurance through the Affordable Care Act, or An Employer for all 12 months of 2021? (ACA) (Employer) (None)

**Notes:**  
**Referred by:** \_\_\_\_\_

**Direct Deposit Information:** Free! You can choose Direct Deposit even if not filing electronically.

**Tax preparation fees are due at time of filing. Payment methods accepted are cash, check, or credit cards (Master Card & Visa).**

Name of Bank: \_\_\_\_\_  Checking     Savings

Routing Number: \_\_\_\_\_ Account Number: \_\_\_\_\_



If you file electronically you will be required to sign IRS Form (Electronic Filing Authorization) and pay your invoice in full before our office can E-File your tax return for you.