

Client Profile

Please present your DL and SS Cards of you and all persons listed on return at the initial interview.
A copy of all DL and SS cards is also needed for our records.

New Client ___ Returning ___ How were you referred to this office? _____

Name: _____ Phone: Cell _____ Home _____

Date of Birth _____ SS# _____

Occupation _____ Military Y N Are you a student Y N Student Loans Y N

Single ___ Married ___ Separated ___ If yes how long _____ Dependents _____

Filing Status: Single Married filing joint Married filing separate Head of Household Qualifying Widow

IRS Pro Pin# _____ Did you have health insurance last year? Y N Provider _____ #Months _____

Pin # for E-filing (5 digits) _____ Do you wish to receive text notification about your refund Y N

Last Years AGI _____ Did you owe the IRS last year? Y N If yes is the balance due paid? Y N

Did you receive a refund last year? Y or N Who prepared your taxes LY _____ \$ _____

Last years refund amount: FedRf _____ StateRf _____

Mailing Address: _____

Has your address changed in the past year? Y or N

Previous Address: _____

Rent ___ or Own ___ Email: _____

RAF _____ **PH #** _____ **\$** _____

Spouse _____ DOB _____ SS# _____

Occupation _____ Phone _____

Home: Rent _____ Own: _____

Mailing Address: _____

Email: _____

ESTIMATE GIVEN BY: _____ FR _____ STR _____ DATE _____