New Client Data Form 2016:

Name: Phone:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Occupation: SSN: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

DOB:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Spouse: SSN:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

DOB:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Occupation:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Home Address:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Dependents:**

Name, SSN, Dob, Relationship \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name, SSN, Dob, Relationship \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Please initial:*** *Please initial:*

\_\_\_\_\_We are not legally able to e-file your return until I have your signature on the authorization to e-file forms. All forms will be sent to you via DocuSign or delivered during tax meeting.

\_\_\_\_\_Please carefully review your return to make sure everything is spelled correctly and you don’t see any missed income/expenses. The IRS has determined you personally responsible for your return, even if it’s filed by a professional.

\_\_\_\_\_Your return is prepared with information you provide us. If we make a mistake we will file an amended return for you as soon as possible to correct the mistake. We will cover the penalty but not the tax you would have paid without the error.

\_\_\_\_\_All tax information should be delivered to us by April 1st in order to ensure we are able to prepare and file before April 15th. (A new RUSH FEE of $50 could be charged if delivered late)

\_\_\_\_\_You must personally read the Letter of Engagement provided to me in my tax organization packet, read online at [www.doesmytaxes.com](http://www.doesmytaxes.com) or read while in the tax office.

\_\_\_\_\_Invoices are to be paid when your return is filed unless other arrangements have been made.

For Renter’s Credit must have: If this is NOT completely filled out you will NOT get the credit!

Landlord’s name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone#:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**DIRECT DEPOSIT INFORMATION:** If not completed you will receive a paper check:

Routing number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Account number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_