

# Current Client Information 2017/2018

California Tax Boutique

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

Occupation: \_\_\_\_\_ Email: \_\_\_\_\_

Driver's License # \_\_\_\_\_ Issue Date: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Spouse: \_\_\_\_\_ Phone: \_\_\_\_\_

Occupation: \_\_\_\_\_ Email: \_\_\_\_\_

Driver's License # \_\_\_\_\_ Issue Date: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Did your address change from last year? If so, please provide your new address:

\_\_\_\_\_

For Renter's Credit

Landlord's name: \_\_\_\_\_ Phone: \_\_\_\_\_

Delete or Add Dependent: *Do not add children you claimed last year!*

Name, SSN & Date of Birth: \_\_\_\_\_

**DIRECT DEPOSIT INFORMATION:** Everyone must update for 2017!

Bank Name: \_\_\_\_\_

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

*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 1<sup>st</sup> in order to ensure we are able to prepare and file before April 15<sup>th</sup>.

\_\_\_\_\_ 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.

Signature & date: \_\_\_\_\_

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[Tracie@DoesMyTaxes.com](mailto:Tracie@DoesMyTaxes.com)