

# New Client Data Form 2017/2018:

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

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

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

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

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

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

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

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

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 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.

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:**

Bank Name: \_\_\_\_\_ Routing number: \_\_\_\_\_

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

