

TAXPAYER INFORMATION

TAX YEAR _____

TAXPAYER NAME	_____
SS#	_____
DATE OF BIRTH	_____
ADDRESS	_____

OCCUPATION	_____
PHONE	_____

EMAIL	_____

SPOUSE NAME	_____
SS#	_____
DATE OF BIRTH	_____
OCCUPATION	_____
PHONE	_____

EMAIL	_____

DEPENDENT NAME	_____
DEPENDENT SS#	_____
DEPENDENT DATE OF BIRTH	_____
LIVED WITH YOU ALL YEAR ?	_____
DEPENDENT RELATIONSHIP	_____

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DEPENDENT SS#	_____
DEPENDENT DATE OF BIRTH	_____
LIVED WITH YOU ALL YEAR ?	_____
DEPENDENT RELATIONSHIP	_____

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DEPENDENT SS#	_____
DEPENDENT DATE OF BIRTH	_____
LIVED WITH YOU ALL YEAR ?	_____
DEPENDENT RELATIONSHIP	_____

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DEPENDENT SS#	_____
DEPENDENT DATE OF BIRTH	_____
LIVED WITH YOU ALL YEAR ?	_____
DEPENDENT RELATIONSHIP	_____

MARITAL STATUS:	SINGLE	DIVORCED	MARRIED	WIDOWED
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NEW CLIENTS:

- PLEASE PROVIDE A COPY OF THE LAST TAX RETURN COMPLETED (PRIOR YEAR).
- PLEASE PROVIDE A COPY OF DRIVER'S LICENSE FOR TAXPAYER AND SPOUSE.
- PLEASE PROVIDE A COPY OF SOCIAL SECURITY CARD FOR DEPENDENTS.

ALL CLIENTS:

PLEASE PROVIDE A COPY OF DRIVER'S LICENSE IF IT IS UPDATED SINCE LAST YEAR.

WERE YOU, SPOUSE AND DEPENDENTS AZ RESIDENTS ALL YEAR?	YES	NO
DID YOU AND YOUR SPOUSE LIVE TOGETHER ALL YEAR?	YES	NO
WERE YOU, SPOUSE OR DEPENDENTS STUDENTS IN FIRST 4 YEARS OF COLLEGE?	YES	NO
WOULD YOU LIKE A DIGITAL COPY OF YOUR TAX RETURN?	YES	NO

AT ANY TIME DID YOU RECEIVE, SELL, SEND OR EXCHANGE OR ACQUIRE A FINANCIAL INTEREST IN VIRTUAL CURRENCY?		YES	NO
TAXPAYER OR SPOUSE INITIALS			
AT ANY TIME DID YOU HAVE ANY INTEREST OR AUTHORITY OVER A FOREIGN ACCOUNT OR FOREIGN TRUST?		YES	NO
TAXPAYER OR SPOUSE INITIALS			
DO YOU WANT A DIRECT DEPOSIT OF YOUR REFUND?		YES	NO
IF YOU OWE, DO YOU WANT IT DIRECTLY TAKEN FROM YOUR ACCOUNT (DIRECT DEBIT) ?		YES	NO
BANK NAME	ROUTING #	ACCOUNT #	
			Checking/Savings

TAXPAYER OR SPOUSE SIGNATURE _____ DATE _____

HOW DID YOU HEAR ABOUT US? _____