



Client Name: First \_\_\_\_\_ Initial \_\_\_\_\_ Last \_\_\_\_\_

Social Security # \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Client DOB \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Client Occupation \_\_\_\_\_

Spouse Name: First \_\_\_\_\_ Initial \_\_\_\_\_ Last \_\_\_\_\_

Social Security # \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Spouse DOB \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Spouse Occupation \_\_\_\_\_

Phone # (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Alternate # (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Copy of last year's return attached

Is address shown on last year's return still correct?  Yes  No

If no, enter current address: \_\_\_\_\_

W-2' enclosed:  Yes  No If no, explain: \_\_\_\_\_

Number of W-2's: \_\_\_\_\_ Other documents enclosed (Forms 1098, 1099, etc):  Yes  No

State of Residence: \_\_\_\_\_ Did you live and work the entire year in this state?  Yes  No

If no, list other states: \_\_\_\_\_

**Dependents** (or persons living in your household), if more than three use back of sheet.

First \_\_\_\_\_ Middle \_\_\_\_\_ Last \_\_\_\_\_

DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ SS# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

First \_\_\_\_\_ Middle \_\_\_\_\_ Last \_\_\_\_\_

DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ SS# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

First \_\_\_\_\_ Middle \_\_\_\_\_ Last \_\_\_\_\_

DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ SS# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Do you want direct deposit for your Federal Return:  Yes  No

Do you want direct deposit for your State Return:  Yes  No

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Copy of voided check attached