

CLIENT DATA SHEET

Taxpayer Name: _____ SSN: _____
 Occupation: _____ Date of Birth: ____/____/____ (mm/dd/yyyy)
 Phone (Day): _____ Phone (Eve): _____ Email: _____
 Spouse Name: _____ SSN: _____
 Occupation: _____ Date of Birth: ____/____/____ (mm/dd/yyyy)
 Phone (Day): _____ Phone (Eve): _____ Email: _____
 Address: _____ City: _____ State: _____ Zip: _____

Filing Status Information

As of December 31, 2017: Single Married Legally Separated Divorced

If Legally Separated or Divorced:
 Did you spend one night in the same household with your spouse after July 1, 2017? Yes No
 Did you provide more than half the cost of keeping up a home? (food, clothing, shelter, etc.) Yes No

If you are due a refund, would you like it directly deposited into your bank account? Name of Bank: _____
 Checking Savings Routing Number: _____ Account Number: _____

Family and Dependent Information

List everyone who lived in your home and anyone living outside your home that you or your spouse supported during the tax year. Specify relationship as: Son, daughter, stepchild, foster child, brother, sister, stepbrother, stepsister, or a descendant of any of them, also mother or father.

DO NOT INCLUDE YOURSELF OR SPOUSE. "CHILD" IS NOT CONSIDERED A RELATIONSHIP							
Dependent Last Name & SSN Must Match Social Security Administration Records							
First	MI	Last	Date Of Birth (mm/dd/yyyy)	Social Security Number	Relationship This person is my:	Months in Home For 2016	
						Can anyone else claim dep./qualifying child?	If age 19-23, were they a full-time student?
			/ /			Y N	Y N
			/ /			Y N	Y N
			/ /			Y N	Y N

I understand that fees must be paid before your tax return is delivered to you or filed for you. If you terminate tax preparation before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.

I certify that all information given on this form is true and accurate to the best of my knowledge.

Taxpayer Signature: _____ Date: _____
 Spouse Signature: _____ Date: _____