

TAX CLIENT INFORMATION SHEET

I. TAXPAYER/SPOUSE INFORMATION

Primary Taxpayer Full Name (from social security card): _____

Social Security Number: ____ - ____ - ____ Date of Birth: MM ____ DD ____ YEAR ____

Occupation: _____ Do you want \$3 to go to the Presidential Campaign Fund: ____

SPOUSE FULL NAME (as shown on social security card): _____

Social Security Number: ____ - ____ - ____ Date of Birth: MM ____ DD ____ YEAR ____

Occupation: _____ Do you want \$3 to go to the Presidential Campaign Fund: ____

MARITAL STATUS (circle one): Single Married Separated

STREET ADDRESS: _____

CITY _____ STATE _____ ZIP _____

EMAIL ADDRESS: _____

Daytime Phone #: (____) ____ - ____ Drivers License # _____ Exp date _____ Issue date _____

Evening Phone #: (____) ____ - ____ SP Drivers License # _____ Exp date _____ Issue date _____

Closest living relative name _____ Phone _____

Who may we thank for referring you to Acct-Tech Consulting LLC.? _____

II. EXEMPTIONS

Please complete the following as applicable

	Name (As shown on social security card)	Date of Birth	Social Security Number	Relationship To Taxpayer	Months in Home
Dependent					
Dependent					
Dependent					
Dependent					
Dependent					

III. REFUND

If you are receiving a refund, tell us how you would like to receive the refund. (Check only one)

___ Check in the Mail (approx. 3 weeks- fees paid up front)

___ I'd prefer to make that decision when I know the amount of my refund.

___ Direct Deposit to your account (9-15 days- fees paid up front)

Financial Institution: _____

Routing Number: _____ Account Number: _____

Checking or Savings (please circle only one)

CLIENT INFORMATION SHEET

IV. ADDITIONAL INFORMATION

Did you or your spouse at any time during the year:

Circle: If yes, please provide

Did you live in any other states?	NO	YES	
Did you work in any other states?	NO	YES	
If yes, list the states and the dates you lived there:			
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Receive wages, salaries, or any other employer compensation?	NO	YES	All W-2 forms
Have you received W-2 forms from ALL employers?	NO	YES	
Receive unemployment compensation?	NO	YES	All 1099-G forms
Receive Social Security Benefits?	NO	YES	All 1099-SSA forms
Receive Alimony?	NO	YES	
If yes, list amount _____			
Pay alimony?	NO	YES	
If yes, list name of recipient _____			
SSN of recipient _____ Amount _____			
Do you pay daycare expenses?	NO	YES	Provider name &
Address _____			
If yes, list amount _____ SSN _____			
Receive winnings from gambling? (Lottery, racetrack, casinos, raffles)	NO	YES	All W-2-G forms
Receive any miscellaneous income? (Prizes, awards, jury duty)	NO	YES	
If yes, list amount _____			
And describe _____			
Are you claimed as a dependent on someone else's tax return?	NO	YES	
Pay interest on student loans?	NO	YES	

Receive pension, annuity, IRA or retirement income?	NO	YES	All 1099-R forms
Receive interest on savings, cash, US bonds, stock dividends?	NO	YES	All 1099-INT
Do you have any of the following?			
Home Mortgage?	NO	YES	All 1098 forms
Medical expenses or pay for health insurance?	NO	YES	List with amounts
Contributions to charity, church, etc?	NO	YES	List with amounts
Out-of-pocket expenses or use your personal vehicle on the job?	NO	YES	List with amounts
Loss from casualty (fire, theft, natural disaster)	NO	YES	List with amounts
Contribute to an IRA, SEP, Keogh, or simple retirement plan?	NO	YES	
Pay college tuition expenses?	NO	YES	

CLIENT INFORMATION SHEET

Did you or your spouse at any time during the year:

- Sell stock, mutual fund, or other securities?
- Receive a 1099-MISC?
- Own your own business or were self-employed?
- Use a portion of your home exclusively for business?
- Do you own rental property?
- Receive royalties?
- Sell your Home
- Sell any other property (equipment, land, etc.)?
- Did you make estimated tax payments?

Circle: If yes, please provide

- NO YES All 1099-B forms
- NO YES All 1099-MISC
- NO YES
- NO YES
- NO YES
- NO YES
- NO YES All 1099-S forms
- NO YES
- NO YES

- Operate a farm? NO YES
- Receive installment payments on property sold? NO YES
- Have an interest in a partnership, S-corporation, estate, or trust? NO YES All K1 forms
- Have income as a minister? NO YES

V. SIGNATURE

ALL INFORMATION I HAVE GIVEN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE

IF I CHOSE NOT TO COMPLETE THIS RETURN, UPON TAX INFORMATION BEING INPUT INTO THE COMPUTER BY A TAX PREPARER THERE WILL BE A \$65.00 CONSULTATION FEE.

SIGNATURE: _____ **Date:** _____