

# NEW CLIENT TAX QUESTIONNAIRE

## Taxpayer Information:

Taxpayer Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security #: \_\_\_\_\_

Occupation: \_\_\_\_\_ Home Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_ DL: \_\_\_\_\_

E-Mail: \_\_\_\_\_

Spouse Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security #: \_\_\_\_\_

Occupation: \_\_\_\_\_ Home Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_ DL: \_\_\_\_\_

E-Mail: \_\_\_\_\_

## Dependent Information:

Dependent Name #1: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Months Lived in Home: \_\_\_\_\_ Full Time Student (Yes/No): \_\_\_\_\_

Relationship: \_\_\_\_\_ **(Son, Daughter, Relative, Foster Child, Other)**

Dependent Name #2: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Months Lived in Home: \_\_\_\_\_ Full Time Student (Yes/No): \_\_\_\_\_

Relationship: \_\_\_\_\_ **(Son, Daughter, Relative, Foster Child, Other)**

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Dependent Name #3: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Months Lived in Home: \_\_\_\_\_ Full Time Student (Yes/No): \_\_\_\_\_

Relationship: \_\_\_\_\_ **(Son, Daughter, Relative, Foster Child, Other)**

Dependent Name #4: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Months Lived in Home: \_\_\_\_\_ Full Time Student (Yes/No): \_\_\_\_\_

Relationship: \_\_\_\_\_ **(Son, Daughter, Relative, Foster Child, Other)**

Dependent Name #5: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Months Lived in Home: \_\_\_\_\_ Full Time Student (Yes/No): \_\_\_\_\_

Relationship: \_\_\_\_\_ **(Son, Daughter, Relative, Foster Child, Other)**

**Direct Deposit Information:**

Bank Name: \_\_\_\_\_

Routing Number: \_\_\_\_\_

Account Number: \_\_\_\_\_

Checking or Savings \_\_\_\_\_

\*Please send a copy of driver's license for Taxpayer and Spouse\*