

2021 Client Information Intake Worksheet

Please provide the following materials:

This COMPLETED form along with ALL income wage statements (W-2's and 1099's)

New Clients - - Include a copy of last year's Federal and State Income Tax Return(s)

| | |
|---|---|
| Name of Taxpayer: _____ Occupation: _____ Current Address: _____ City: _____ Apt # _____ State: _____ Zip: _____ Township and County: _____ Drivers License Number: _____ Issue Date: _____ Expiration Date: _____ Best Contact Number: _____ Is this a cell? _____ Can I text you at this number? _____ Current Email: _____ Bank Name: _____ Bank Routing Number: _____ Bank Account Number: _____ | Name of Spouse: _____ Occupation: _____ Current Address: _____ City: _____ Apt # _____ State: _____ Zip: _____ Drivers License Number: _____ Issue Date: _____ Expiration Date: _____ Best Contact Number: _____ Is this a cell? _____ Can I text you at this number? _____ Current Email: _____ |
|---|---|

Please Note: This Form Is Required. It must be submitted when you drop off your documents or when you email your documents.

Failure to complete and sign this form means I cannot prepare your return and you will be instructed to come and pick up your documents.

RENTERS

| Name of Landlord | Address of Landlord | Number of Months @ Address | Rent Paid @ Address- Include only amt you paid |
|------------------|---------------------|----------------------------|--|
| | | | |
| | | | |

Roommate Information - This is necessary to determine whether you are eligible for a renter's credit

Did you have a Roommate during any part of the year you paid rent?

How much rent did your roommate pay and for how many months?

What is the approximate amount of the roommate's annual income?

EXEMPTION AND DEPENDENT DATA

| Name | Social Security Number | Relationship to you/Can they be claimed by someone else | Date of Birth |
|----------------|------------------------|---|---------------|
| Self- Taxpayer | | | |
| Spouse | | | |
| | | | |
| | | | |
| | | | |

PLEASE COMPLETE OTHER SIDE OF THIS FORM