



# CLIENT INFORMATION FORM 2018 TAX RETURN FILING

**New Clients: Please complete this form in its entirety. Please complete your name(s) as shown on your Social Security card(s). Also, please note the following: In order to comply with IRS recommendations and the requirement of most State Tax Authorities, you (and your Spouse, if married) will be required to provide me with a copy of your State-issued Driver's License or State-issued Identification Card, in addition to providing the information in writing on Page 2 of this form.**

**Returning Client: Please complete only your name(s), as shown on Social Security card, plus any information that has changed since last tax-filing season. Also, please provide a copy of the Social Security card for any new dependent(s) you are adding on your tax return (see page 2 for adding new dependents).**

**[Please note that if I do not receive an updated Client Information form with your changes, I will assume that all information requested below is unchanged from your 2017 filing.]**

Taxpayer's Name \_\_\_\_\_

Filing Status:  Single  Married  Head of Household (Single w/ Dependent)

Spouse's Name (if married) \_\_\_\_\_

Address \_\_\_\_\_

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

Taxpayer's e-mail address: \_\_\_\_\_

Spouse's e-mail (if married): \_\_\_\_\_

Home Phone (if applicable) \_\_\_\_\_

Taxpayer's Cell Phone \_\_\_\_\_

Spouse's Cell Phone \_\_\_\_\_

Taxpayer's Date of Birth \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Spouse's Date of Birth \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Taxpayer's Occupation \_\_\_\_\_

Spouse's Occupation \_\_\_\_\_

***Please continue to page two to complete this form.***

**Taxpayer's State-issued Driver's License or Identification Card information:**

Issuing State: \_\_\_\_\_ License/Identification Number: \_\_\_\_\_

Issue Date: \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ Expiration Date: \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_

**Spouse's State-issued Driver's License or Identification Card information (if applicable):**

Issuing State: \_\_\_\_\_ License/Identification Number: \_\_\_\_\_

Issue Date: \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ Expiration Date: \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_

**For direct deposit to your account of any refund, or direct debit from your account for any tax due, please fill out your bank information below:**

Name of bank \_\_\_\_\_

Bank routing number \_\_\_\_\_

Account number \_\_\_\_\_

Is this account? Please check (✓) one: Checking  or Savings

**Dependents on Last Year's Tax Return (returning clients only):**

First name of dependents you claimed in 2017, but **will not** claim again in 2018.

\_\_\_\_\_

**Information on new dependents/children (including adopted or foster children) you will be claiming on your 2018 tax return (use additional sheet, if needed):**

Name (as shown on SS card) \_\_\_\_\_

SS# \_\_\_\_\_ Date of Birth \_\_\_\_\_

Name (as shown on SS card) \_\_\_\_\_

SS# \_\_\_\_\_ Date of Birth \_\_\_\_\_

Name (as shown on SS card) \_\_\_\_\_

SS# \_\_\_\_\_ Date of Birth \_\_\_\_\_

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