



## PERSONAL DATA

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
TAXPAYER NAME SOCIAL SECURITY # DATE OF BIRTH

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
SPOUSE NAME SOCIAL SECURITY # DATE OF BIRTH

STREET ADDRESS

\_\_\_\_\_  
CITY STATE ZIP

( ) \_\_\_\_\_ - \_\_\_\_\_ ( ) \_\_\_\_\_ - \_\_\_\_\_ ( ) \_\_\_\_\_ - \_\_\_\_\_  
HOME PHONE CELLULAR PHONE WORK PHONE  
 OK, to receive text messages

EMAIL ADDRESS

\_\_\_\_\_  
TAXPAYER OCCUPATION SPOUSE OCCUPATION

## FILING STATUS

SINGLE  MARRIED FILING JOINT  MARRIED FILING SEPARATE  HEAD OF HOUSEHOLD

\*To qualify for Head of Household you must be unmarried or considered unmarried on the last day of the year. You must also have paid more than half the cost for the upkeep of the main home for a qualifying dependent.

Can Someone Else Claim You on Their Income Tax Return?

## DEPENDENTS

NAME	DOB	SOCIAL SECURITY	RELATIONSHIP	STUDENT OR DISABLED

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## SERVICE

- Federal Tax Preparation  E-file  
 State Tax Preparation  Mail Paper Return

### Bank Products (No Upfront Payment)

- RAC Refund Anticipation Check (Refund in 7 – 14 days)  
 Direct Deposit  
 Printed Check  
 Visa Debit Card Refunds deposited on reloadable Visa Debit Card

### Direct Payment Options (Payment Due At Time of Service) **NO PERSONAL CHECKS**

- Direct Deposit Refunds deposited directly into Bank of Acct (Refund in 7 – 14 days)  
 Check Mailed directly from IRS to your home (Refund in 18 - 24 days)

Deposit Information RTN: \_\_\_\_\_ ACCT: \_\_\_\_\_

\*Refund time frame is based on normal processing time of 7-14 days for the IRS. However, actual receipt of payment can vary dependent on when funds are released by the IRS.

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## Life Events Last Year

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- |   |  |
|---|--|
| <input type="checkbox"/> Mortgage Interest              | <input type="checkbox"/> Student Loan Interest   |
| <input type="checkbox"/> Real Estate Taxes              | <input type="checkbox"/> Moved   |
| <input type="checkbox"/> Ad Valorem Vehicle Tax         | <input type="checkbox"/> Teacher Expenses  |
| <input type="checkbox"/> Charitable Contributions       | <input type="checkbox"/> Prior Year State Refund                                       |
| <input type="checkbox"/> Un-Reimbursed Job Expenses     | <input type="checkbox"/> Alimony Received or Paid                                      |
| <input type="checkbox"/> Work Two Jobs                  | <input type="checkbox"/> Energy Efficient Home Improvements                            |
| <input type="checkbox"/> Self-Employed                  | <input type="checkbox"/> Receive Unemployment Benefits                                 |
| <input type="checkbox"/> Home Based Business            | <input type="checkbox"/> Receive Social Security                                       |
| <input type="checkbox"/> Gambling Earnings              | <input type="checkbox"/> Audited By IRS  |
| <input type="checkbox"/> Withdrew Money from Retirement | <input type="checkbox"/> Disallowed EIC  |
| <input type="checkbox"/> Property Loss or Causality     | <input type="checkbox"/> Refund Payment Withheld Last Year                             |
| <input type="checkbox"/> Education Expenses             | <input type="checkbox"/> Any other circumstance you think we might need to know about: |
| <input type="checkbox"/> Foreclosure or Repossession    |  |

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I, the undersigned, hereby certify that all the information I have provided is true and correct to the best of my knowledge. I further certify that I have provided the preparer all documents pertaining to **earned** and **unearned income** as well as any information necessary to properly complete my tax return.

Taxpayer Signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse Signature \_\_\_\_\_ Date \_\_\_\_\_