

NEW CLIENT INFORMATION

Today's date _____

Please fill out front and back.

Primary	Taxpayer Full Name <small>as appears on social security card</small>	Social Security Number _____ - _____ - _____
	_____	Date of Birth ____/____/____
	Occupation _____	Phone _____
		Email _____

Spouse	Spouse Full Name <small>as appears on social security card</small>	Social Security Number _____ - _____ - _____
	_____	Date of Birth ____/____/____
	Occupation _____	Phone _____
		Email _____

Marital Status on Dec 31

Never Married Married Divorced Widowed Separated Date of Separation _____

Mailing Address	Please provide a copy of the last 2 years tax returns. Copies of Social Security Cards Copies of picture ID's for taxpayer and spouse

Dependents Supporting documents may be required to prove support and/or relationship

<i>Name</i>	<i>DOB</i>	<i>SSN</i>	Relationship <small>Son, daughter etc.</small>	Months lived in home in 2022	Full time student	Disa-abled

YES / NO Were you or any family member on Market Place Health Care/
Obama Care at any time during the year 2022?

Form 1095 -A must be provided or you tax return will be delayed by IRS.

Identification Information The IRS and VA is requesting this information to curb identity theft.
Fill in if copies of ID's are not available.

Taxpayer

Type of photo ID Driver's License State issued photo ID
ID number _____ State issued in- VA / WV other _____
Issue date _____ Expiration date _____

Spouse

Type of photo ID Driver's License State issued photo ID
ID number _____ State issued in- VA / WV other _____
Issue date _____ Expiration date _____

IRS Direct Deposit – Refund direct deposited into your checking account.

Payment due at time of pick up.

IRS Check In the mail – If you do not have a bank account, we can electronically file your tax return and have the IRS send you a check in the mail .

Payment due at time of pick up.

Electronic Refund Transfer Check or Deposit – You will pick up the check at TAX CARE or have your money deposited into your account. All fees can be deducted from the refund, so no payment would be required at the time of service.

Additional \$63.95 fee above tax prep fee.

If you choose direct deposit we need to ensure correct direct deposit account information each year.

Bank name, routing and account numbers are needed.

Please provide us with a voided check not a deposit slip.

Please specify if checking or savings account. We need this information before being able to prepare your return if you choose direct deposit.