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|  | CLIENT INFORMATION |  |  |
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|  | |  |  |  |  |  | | --- | --- | --- | --- | --- | | Date: Click or tap to enter a date. | | | | | | **Client Name**: Click or tap here to enter text.  DOB: **Click or tap to enter a date.** | | | **Social Security #**: Click or tap here to enter text. | | | CLIENT INFORMATION | | | | | | Spouse/Partner: Click or tap here to enter text. DOB: Click or tap to enter a date. | Social Security #: Click or tap here to enter text. | | | | | Phone: Click or tap here to enter text. | Email Address: Click or tap here to enter text. | | | | | Address: Click or tap here to enter text. | | | | | | City: Click or tap here to enter text. | State: Click or tap here to enter text. | | | ZIP Code: Click or tap here to enter text. | | **Marital Status**: Single  Married  Divorced  Widowed  **Number of Dependents**: Click or tap here to enter text. | | | | | | Dependent’s Name: Click or tap here to enter text. Social Security #: Click or tap here to enter text. DOB: Click or tap to enter a date. | | | | | | Dependent’s Name: Click or tap here to enter text. Social Security #: Click or tap here to enter text. DOB: Click or tap to enter a date. | | | | | | Dependent’s Name: Click or tap here to enter text. Social Security #: Click or tap here to enter text. DOB: Click or tap to enter a date. | | | | | | FILING INFORMATION | | | | | | Income: W2  1099 | | Filing Status: Single  Head of Household  Married  Married Filing Separate | | | | |  | | --- | | IDENTIFICATION | | | | | | | **State:** Click or tap here to enter text.  **License #:** Click or tap here to enter text. **State ID #:** Click or tap here to enter text.  **Issued Date:** Click or tap to enter a date. **Expiration Date:** Click or tap to enter a date. | | | | | | Previous Tax Year AGI: Click or tap here to enter text. | | Filing Option: E-File  Mail | | | | **Banking Information (Please provide banking information of direct deposit)** | | | | | | Bank Name: Click or tap here to enter text. | | Routing #: Click or tap here to enter text.  Account #: Click or tap here to enter text. | | | | |  |