



HAVE YOU FILED TAXES FOR PREVIOUS YEAR **YES** **NO**

FIRST: _____ **MIDDLE:** _____ **LAST:** _____

ADDRESS: _____ **MAILING ADDRESS:** _____ **HOME ADDRESS:** _____

CITY: _____ **STATE:** _____ **ZIP:** _____

HOME PHONE: _____ **EMAIL ADDRESS:** _____

DATE OF BIRTH: _____

SOCIAL SECURITY: _____ **ITIN:** _____

DRIVER'S LICENSE _____ **EXP** _____

MARITAL STATUS **SINGLE** **MARRIED** **DIVORCED** **MARRIED FILING SEPARATE**

IF RENTING
LANDLORD PHONE _____

HOME ADDRESS: _____

CITY: _____ **STATE:** _____ **ZIP:** _____

NEW CLIENT: **RETURNING CLIENT**

IF WOULD LIKE THE REFUND TO BE DIRECT DEPOSIT, PLEASE PROVIDE THE FOLLOWING INFORMATION

BANK NAME: _____ **ACCOUNT** _____

ROUTING NUMBER: _____ **WILL YOU BE PAYING-**

CASH:
DEBIT/CREDIT CARD: ZELLE
BANK PRODUCT: 3rd Party

COST OF SERVICES DEPENDS ON DOCUMENTS NEEDED. If you owe to IRS or state, or do not have any credits. You do not qualify for bank product. Therefore, your fees will be upfront.