

# CLIENT DATA SHEET

Name: \_\_\_\_\_ SSN: \_\_\_\_\_ DOB: \_\_\_\_\_

Spouse: \_\_\_\_\_ SSN: \_\_\_\_\_ DOB: \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

## Dependents

Name:	SSN	DOB	Relationship / #Mos. in Home

## Bank Information

Bank Name: \_\_\_\_\_ Routing No: \_\_\_\_\_

Account No: \_\_\_\_\_ Checking or Savings

Did you receive Letter 6419? (Regarding Child Tax Credit) \_\_\_\_\_

Amount received for Advance Child Tax Credit: \_\_\_\_\_

Did you receive the 3<sup>rd</sup> Stimulus Payment? \_\_\_\_\_

Amount of Payment Received: \_\_\_\_\_

Under the penalties of perjury, I certify the information presented in this certification and any evidence submitted with it, is true, accurate and complete. The undersigned further understands that providing false information for purposes of defrauding the U. S Department of the Treasury may result in demand of repayment and the imposition of penalties and other actions as allowed by law.

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

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date