

Extreme Royalty Tax & Notary Services- 2025 Tax Intake Form

First Name **MI** **Last Name** **SSN#** **Date of Birth**

Occupation: _____ **Identity Theft PIN (if applicable)** _____

Spouse First Name **MI** **Last Name** **SSN#** **Date of Birth**

Occupation (Spouse) _____ **Identity Theft PIN (if applicable)** _____

Home Address **City** **State** **Zip Code**

() _____ **@** _____

Reliable Contact Number **E-mail (If applicable)**

Filing Status

- ☐ **Single** ☐ **Widow/Widower** ☐ **Head of Household** ☐ **Married Filing Jointly**
☐ **Married Filing Separately**

Dependents

Dependent(s) Name	Date of Birth	SSN#	Relation	Time In Home During Tax Year
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1. _____

2. _____

3. _____

4. _____

Were you or any dependent enrolled in college during the tax year? ☐ **Yes** ☐ **No**

Are you purchasing or closing on a home this year? ☐ **Yes** ☐ **No**

Are you purchasing a home within the next 2 years? ☐ **Yes** ☐ **No**

Extreme Royalty Tax & Notary Services
2600 S. Loop West, Suite 296
Houston, Texas, 77054
832.738.9841 (Office) 713.758.0154 (Fax)

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Daycare: Number of Children in Child Care : (If Applicable.)_____

Name of Daycare/ Provider	Address	City	State	Zip Code
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EIN# or Social Security# of Provider:

Direct Deposit.... Please include the banking information below:

Name of Financial Institution: _____

Routing number: _____

Account number: _____

Check One: **Checking:** ☒ **Savings:** ☐

Confidentiality Clause

Disclaimer: We, at Extreme Royalty Tax & Notary Services, LLC., guarantee the confidentiality of all information provided to this office. Your signature confirms that you have provided us with factual information without any misrepresentation of funds, employment, and/or other personal data required by the IRS, participating Banking Product, and/or Imperial Solutions Tax Services.

By signing below, I agree that Extreme Royalty Tax & Notary Services, LLC. will advise, prepare, file and/or amend my tax return(s) for the current tax year. By doing so, I have been advised of, agree to, and accept the following terms:

I acknowledge that I will fully disclose my tax situation and will provide copies of all supporting documents (including all W2s, 1099s, etc.) at the best of my ability.

All preparation fees have been disclosed. By signing below, I agree to the discussed preparation fee and understand that it will be my responsibility to pay.

I / We hereby acknowledge that the information provided is true and correct.

Signature _____ Date _____

Signature (Spouse) _____ **Date** _____

Who Referred You?

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