

TAX YEAR 2022

New Client Contact Information Worksheet

Please use this worksheet to give us basic contact information for preparation of your tax returns. You do not need to complete this each year; only complete if you are new to Peachtree (welcome and yay!) or if there are changes. Also, you do not need to provide information if we can find it elsewhere such as SSNs or banking information. Shockingly, your date of birth is not displayed on a tax return.

Taxpayer

Legal Name _____ Occupation _____

Social Security Number _____ Date of Birth _____

Cell Phone _____ Work Phone _____

Primary Email: _____

Secondary Email: _____

Driver's License Number* _____ Issuing State _____

Date Issued _____ Expiration Date _____

Spouse

Legal Name _____ Occupation _____

Social Security Number _____ Date of Birth _____

Cell Phone _____ Work Phone _____

Primary Email: _____

Secondary Email: _____

Driver's License Number* _____ Issuing State _____

Date Issued _____ Expiration Date _____

Address

For IRS Mailings _____

Physical Address (if Different) _____

WE WILL NEED DEPENDENT SSN'S AND DOB'S

Banking (OR PROVIDE A VOIDED CHECK) Name of Bank _____

Account Type _____

Routing Number _____ Account Number _____

*Driver's License information is needed by the IRS and most States to reduce identity theft and the amount of fraudulent tax returns being filed.