

## TAX YEAR 2023

## 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. In addition, 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 printed on a Federal income 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 ANY/ALL DEPENDENT NAMES, 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.