

COLEMAN ENTERPRISES TAX SERVICE
 4822 Waywood Dr.
 ZACHARY, LA 70791
 (225) 654-8999 ph ♦ (225) 658-4928 fax

CLIENT DATA SHEET

*** All Clients Filing Electronically Must Use the Name and Social Security Number that Exists ***
 *** on the Social Security Card and on File with the Social Security Administration ***

Taxpayer's Full Name: _____ Social Security Number: _____ Date of Birth: _____ Home Phone: _____ Work Phone: _____ Occupation: _____ Email: _____ Address: _____ _____ _____	Spouse's Full Name: _____ Social Security Number: _____ Date of Birth: _____ Other : _____ Work Phone: _____ Occupation: _____ Email: _____ _____ _____
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TAX SEASON STARTS FEBRUARY 12, 2021

***** Make a copy of the Taxpayer's, Spouse's, and Dependent's Social Security Cards*****

Dependent's Information

NAME	BIRTH DATE	SOCIAL SECURITY NUMBER	RELATIONSHIP

REFUND ANTICIPATION LOAN (RAL) or DIRECT DEPOSIT CAPABILITIES (RT) INFORMATION

***** Need two forms of identification – One must be Picture ID w/ Signature *****

Copy Driver's License _____ Copy of Social Security Card
 Current Year's IRS Mailing Label Current Military ID
 Recovery Rebate Payment #1 _____ Payment #2 _____

Filing Status: Single – Dependent of Another Single Head of Household (HOH)
 Married Filing Jointly (MFJ) Married Filing Separate (MFS)

Protection Plus Audit Assistance & Identity Theft Restoration 1098 Educational Deduction

Type of Banking Service Applying for: Fast Cash Advance (up to \$6,000) 7-14 Day Refund (RT)

Account Direct Deposit Information Checking Savings Other _____
Bank Routing Transit #: _____ **Account #:** _____ **Bank Name:** _____

COMPLETE INFORMATION BELOW ONLY IF YOU ARE APPLYING FOR A RAL (24-48 hour refund)

Current Employer's Name: _____ **Phone #:** _____
Employer's Address: _____
Closest Relative (Not Living with you) _____ **Relationship** _____ **Ph#** _____

Client must sign the Refund Anticipation Loan and RAL Account Application and Agreement. Then compare that signature with the signature on the Client's Social Security Verification or forms of identification. Also, verify that the primary filer's name on the Tax Return Form (1040EZ, 1040A, or 1040) being filed matches exactly the name listed on the social security verification.