

New & Returning Client

PLEASE PRINT

Date _____

Primary Name _____

Spouse Name _____

Current Address _____

City _____ State _____ Zip _____

Home# _____

Circle Filing Status: Married Single Married filing separate Head of Household

Primary Information(Husband)

Spouse Information(Wife)

SS# _____

SS# _____

Birth date _____

Birth Date _____

Occupation _____

Occupation _____

Cell# _____

Cell# _____

Work # _____

Work # _____

Driver L# _____

Driver L # _____

Exp Date _____

Exp Date _____

e-mail _____

e-mail _____

Dependents you will be claiming on your taxes (children, parents etc) _____ Living with You _____

1)Name _____ Relationship _____ Yes No

SS# _____ Birth Date _____

2)Name _____ Relationship _____ Yes No

SS# _____ Birth Date _____

3)Name _____ Relationship _____ Yes No

SS# _____ Birth Date _____

4)Name _____ Relationship _____ Yes No

SS# _____ Birth Date _____

5)Name _____ Relationship _____ Yes No

SS# _____ Birth Date _____

If you are receiving a refund, how do you want that delivered?

Direct deposit: Checking Savings Mail

Bank Name: _____

Routing # _____

Account # _____

*Voided Check required verifying information _____

How did you hear about A & R: Sign Verizon Yellow Book Qwest Friend

If someone referred you please give name so we can thank him or her:

Name: _____

Update In/ _____ Act _____ Drake _____ Outlook _____