# 3T TAX SERVICES

# Client Intake Form

**TAXPAYER NAME**: _____

**SPOUSE NAME**: _____

**ADDRESS**: _____

**PHONE NUMBER**: _____  **SPOUSE PHONE NUMBER:** _____

Please indicate by checkmark if you or your spouse received any of the following forms of income:

|  |  |  |
|---|---|---|
| _____ W-2 Wages | _____ Gambling Winnings | _____ Farm Income |
| _____ Unemployment | _____ Self- Employment | _____ Sale of Stock |
| _____ Alimony | _____ Interest/Dividends |  |
| _____ SS Benefits | _____ Rental Income |  |

Can anyone claim you or your dependent on his or her tax return?          **YES     NO**

Did you pay more than ½ the cost of keeping up your home for the year?          **YES     NO**

Did you pay someone to babysit your child or children while you
 worked or looked for work?          **YES     NO**

Did you make any energy saving improvements to your home?          **YES     NO**

Do you have any First-Time Home Buyer Credit that needs to be repaid?          **YES     NO**

Did and your dependents you have health insurance during the tax year?          **YES     NO**

How many months were you insured? _____  Dependents? _____

**I attest that the information contained in this questionnaire is true and correct.**

_____  _____        _____  _____

TAXPAYER                                      DATE                      SPOUSE                                           DATE

# PAYMENT & REFUNDS

**How do you want to pay?**      _____PAY UPFRONT (CASH, CHECK, OR DEBIT)      _____FEES WITHHELD FROM REFUND

**Would you like to apply for a refund advance?** _____ Yes _____ No

If you are due a refund **AND** elect to have your fees withheld from your refund you may elect to receive it one of three ways:

_____      **Direct Deposit** -  You can receive your refund with fees withheld into an existing bank account in your name in less than 21 days after IRS acceptance.

| ACCOUNT TYPE | ROUTING NUMBER | ACCOUNT NUMBER |
|---|---|---|
| [ ] CHECKING    [ ] SAVINGS | | |

_____      **Prepaid Debit Card** – You can receive your refund with fees withheld onto a NetSpend Card in less than 21 days after IRS acceptance. You can be notified when you money has been deposited by email or text message.

_____      **In-Office Check – You can receive your refund with fees withheld on a check printed at this office in less than 21 days after IRS acceptance.**

## This section verified by 3 T'S TAX SERVICES

| | TAXPAYER | SPOUSE |
|---|---|---|
| **DATE OF BIRTH** | | |
| **SOCIAL SECURITY NUMBER** | | |
| **IF CLIENT ELECTS TO HAVE FEES DEDUCTED FROM REFUND** | | |
| **DRIVER LICENSE OR STATE  IDENTIFICATION** | # <br> ISSUED  BY: <br> ISSUE DATE <br> EXP. DATE: | # <br> ISSUED  BY: <br> ISSUE DATE <br> EXP. DATE: |
| **ALTERNATE IDENTIFICATION** | ID#1 <br><br> ID#2 | ID#1 <br><br> ID#2 |
| | | |

| | DEPENDENT INFORMATION | | |
|---|---|---|---|
| | **1** | **2** | **3** |
| **DEPENDENT NAME** | | | |
| **SOCIAL SECURITY NUMBER** | | | |
| **DOB** | | | |
| **RELATIONSHIP** | | | |
| **# OF MONTHS LIVED WITH YOU** | | | |

My signature confirms that the taxpayer identification information entered above is true and accurate and has been verified by me.

Staff Signature: _____      Date: _____