

For ELCPA Staff Use

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|-----------------|----------------------|----------------|----------------------|-------------------|----------------------|
| | Date/Initials | | Date/Initials | | Date/Initials |
| Date in Office: | <input type="text"/> | Date on Hold: | <input type="text"/> | Client Called: | <input type="text"/> |
| Scanned: | <input type="text"/> | Prep Complete: | <input type="text"/> | Client Picked Up: | <input type="text"/> |

TAX CLIENT INFORMATION SHEET

New Clients: We will need to copy you and your spouse's drivers licenses.

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|--|----------------------|------------------|----------------------|
| Filing Status: Single Married filing jointly Married filing separately Head of Household Qualifying Widow(er) | | | |
| TAXPAYER NAME: | <input type="text"/> | SPOUSE NAME: | <input type="text"/> |
| PHONE NUMBER: | <input type="text"/> | PHONE NUMBER: | <input type="text"/> |
| EMAIL: | <input type="text"/> | EMAIL: | <input type="text"/> |
| DATE OF BIRTH: | <input type="text"/> | DATE OF BIRTH: | <input type="text"/> |
| SOCIAL SECURITY: | <input type="text"/> | SOCIAL SECURITY: | <input type="text"/> |
| OCCUPATION: | <input type="text"/> | OCCUPATION: | <input type="text"/> |

| |
|-----------------|
| Address: |
|-----------------|

| DEPENDANTS NAMES (First, MI, Last) | DATE OF BIRTH | SOCIAL SEC. | RELATIONSHIP | Private School/College |
|---------------------------------------|---------------|-------------|--------------|---------------------------|
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Did you purchase health insurance from the market place in 2019? If so, we need form 1095-A _____

Would you like to receive your refund via direct deposit or pay your tax liability via direct deposit?

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|------------------|----------------------|------------------|----------------------|
| Routing # | <input type="text"/> | Account # | <input type="text"/> |
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Client Payment \$ _____ CC-Visa, MC, Disc _____ Check # _____ Cash

Refund (Balance Due) Prior year tax prep fee \$ _____ Current year tax prep fee \$ _____

IRS:

LA:

Vouchers/ACH payment

Direct deposit/Refund check