

For ELCPA Staff Use

Date in Office:	Date/Initials	in TaxDome:	Date/Initials
Scanned:		in Taxwise:	

TAX CLIENT INFORMATION SHEET

New Clients: We will need a copy drivers license(s) AND prior year tax return.

Filing Status: Single Married filing jointly Married filing separately Head of Household Qualifying Widow(er)			
Mailing Address:			
TAXPAYER NAME:		SPOUSE NAME:	
SOCIAL SECURITY:		SOCIAL SECURITY:	
EMAIL:		EMAIL:	
PHONE NUMBER:		PHONE NUMBER:	
DATE OF BIRTH:		DATE OF BIRTH:	
OCCUPATION:		OCCUPATION:	

DEPENDANTS NAMES	DATE OF BIRTH	SOCIAL SEC.	RELATIONSHIP	School

Did you purchase health insurance from the market place in 2025? _____

If so, we need form 1095-A

Do you or anyone else in your family have an identity theft protection pin? _____

If so, please provide a copy.

Did you or your spouse work overtime in 2025? _____

If so, please provide a copy of final paystub(s).

Did you make estimated payments to the IRS and/or State of Louisiana? _____

If so, please provide supporting documentation.

Bank account information for your refund via direct deposit // tax liability payment: checking / savings

Routing #	Account #
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Who is the primary contact? _____

What is the preferred method of contact (call, text, chat or email)? _____

**** in order to receive texts or chat, you must download our client portal app, TaxDome.***

Have you downloaded our client portal TaxDome app? _____

**** we encourage downloading our app; there you can securely upload documents, have access to your tax return(s) and communicate with ELCPA staff.***

Were you referred to us? If so, by whom? _____

FOR ELCPA OFFICE USE ONLY

NOTES

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Refund (Balance Due)

IRS:

LA: Routing # Checking or Savings?
Account #

Date deposit rec'd _____ Check # _____ Cash _____
Deposit required \$200 CC-Visa, MC, Disc _____