

**For ELCPA Staff Use**

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

**TAX CLIENT INFORMATION SHEET**

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

<b>Filing Status:</b> Single Married filing jointly Married filing separately Head of Household Qualifying Widow(er)			
<b>Mailing Address:</b>			
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

<b>Routing #</b>		<b>Account #</b>	
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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? \_\_\_\_\_

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## NOTES

[illegible]

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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 _____
Final balance owed:	=====	Check # _____	Cash _____
Date Balance Paid	_____		CC-Visa, MC, Disc _____