



# Griffin Accounting®

Remember – It's your money, NOT the IRS®

Date \_\_\_/\_\_\_/2024

DROP # \_\_\_\_\_

OFFICE USE: LICENSE SCANNED *Both if MFJ*

SOCIAL SECURITY CARD SCANNED  
for NEW CHILDREN and NEW CLIENTS

Married  Single  Married, filing Separate\*  Widowed (in last 2 years)  Head of Household

**Taxpayer:** \*If married filing separately BOTH incomes NEEDED

**Spouse:**

Date of Birth: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Address: (if different) \_\_\_\_\_

Social Security # \_\_\_\_\_

Social Security # \_\_\_\_\_

Phone# (\_\_\_\_) - \_\_\_\_ - \_\_\_\_

Phone#(\_\_\_\_)- \_\_\_\_ - \_\_\_\_

E-Mail: \_\_\_\_\_

E-Mail: \_\_\_\_\_

PLEASE CHECK if you want your return mailed back \_\_\_ \$12 Fee OR you will pick up \_\_\_

Can anyone else claim you as a dependent? NO \_\_\_ YES \_\_\_ (if YES WHO claims you) \_\_\_\_\_

**Do you have any dependents to claim on your return?**

YES \*  NO  I don't know if they qualify as a dependent

(\*complete below)

Name (as it appears on SS Card)	Social Security #	Birthdate Month/date/year	College Yes/No	Child Care Yes/No	Medical Coverage Yes/No
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Do you  \*rent? OR  own?

\* Landlord's information needed if you RENT

Name \_\_\_\_\_ Address \_\_\_\_\_

Do you live with someone else?  Yes  NO

Medical Coverage:  Yes (all year)  NO  1095-A, Copy REQUIRED by IRS

**NEW DROP CLIENTS NEED:** Copy of last year tax return and ALL W-2/1099 for the year(s) to be completed

Choose type of refund:  Mailed Check OR  Direct Deposit Name of Bank \_\_\_\_\_

Account Number \_\_\_\_\_

Routing Number \_\_\_\_\_

\*\*\*\*\*NOTE: IRS QUESTIONS\*\*\*\*\*

1. Any foreign bank accounts  Yes -No  2. Any Virtual Currency/Assets  Yes -No  3. 1099-INT\*  Yes -No

\*If NO bank statement, then year to date interest needed\*

Refer a friend information for our rewards

How did you hear about us?  INTERNET  FB  YELLOW PAGES  BILLBOARD OR WERE YOU REFERRED BY A FRIEND

PLEASE TELL US THEIR NAME \_\_\_\_\_