

D J DUFFY, INC.

2629 HIGHWAY 70, MANASQUAN, NJ 08736
TEL: (732) 528-7110 FAX: (732) 528-7348
INFO@DJDUFFYINC.COM

NEW CLIENT INFO SHEET

| | <u>Taxpayer</u> | <u>Spouse (if applicable)</u> |
|------------------------|-----------------|-------------------------------|
| Full Name | | |
| Occupation | | |
| Social Security Number | | |
| Date of Birth | | |
| Contact Phone# | | |
| Email Address | | |
| Street Address | | |
| City, State, Zip Code | | |
| Referred By | | |

Dependents

| <u>Full Name</u> | <u>Social Security Number</u> | <u>Date of Birth</u> | <u>Relationship</u> |
|------------------|-------------------------------|----------------------|---------------------|
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Bank Account Information (for Direct Deposit of refund/ACH Debit of Tax Payments)

| | |
|------------|--|
| Bank Name: | <input type="checkbox"/> Checking <input type="checkbox"/> Savings |
| Routing #: | Account #: |

*** Please ensure that we have copies of your most recently filed tax returns. ***

| | | |
|------------------------|---|--|
| Client # _____ | <i>FIRM USE ONLY</i> | |
| Setup in OfficeTools | <input type="checkbox"/> Client Info Entered | |
| Export to Lacerte & QB | <input type="checkbox"/> Client Info Exported | |
| Setup Lacerte, Sync OT | <input type="checkbox"/> Lacerte Setup & Synced | |