



# AUSTIN C. DAVIS, EA

TAX PREPARATION, BOOKKEEPING & PAYROLL  
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## 1. TAXPAYER INFORMATION

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_

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

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

How do you prefer your tax return? ☐ Email ☐ Paper Copy

How did you hear about us? \_\_\_\_\_

How do you file? ☐ Single ☐ Head of Household ☐ Married Filing Joint

☐ Married Filing Separately ☐ Qualifying Widow(er)

## 2. SPOUSE:

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_

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

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

## 3. DEPENDENTS:

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_

## 4. BANK ACCOUNT:

Bank Name: \_\_\_\_\_ ☐ Checking ☐ Savings

Acct Number: \_\_\_\_\_ Routing number: \_\_\_\_\_

\*Under Executive Order 14247, the IRS is moving away from accepting checks for balance due returns or issuing paper checks for refunds for all entities beginning Sept. 30, 2025.

5. ARE YOU CURRENT? ☐ YES ☐ NO When was the last year that you filed? \_\_\_\_\_

6. ADDITIONAL NOTES: i.e. Sole Proprietorship, Rental, Farm, other dependents.