|  |  |
| --- | --- |
| **Client Information** | |
| **Primary Taxpayer Name:** |  |
| **Social Security Number:** |  |
| **DOB:** |  |
| **Occupation:** |  |
| **Phone Number:** |  |
| **Email:** |  |
| **Address Information** | |
| **Street Address:** |  |
| **State:** |  |
| **Zip Code:** |  |
| **County:** |  |
| **School District:** |  |

**Dependent**

* Yes
* No

|  |
| --- |
|  |

**Number**

**Type of Return**

* Individual
* Partnership
* C-Corporation
* S-Corporation
* Non-Profit
* Pension
* Gift Tax
* Payroll
* Payroll Tax