



## Client Information Sheet

<b>Taxpayer Full Name:</b> <input style="width: 95%;" type="text"/> <b>Soc. Sec. Number:</b> <input style="width: 95%;" type="text"/> <b>Date of Birth:</b> <input style="width: 95%;" type="text"/> <b>Occupation:</b> <input style="width: 95%;" type="text"/> <b>E-mail Address:</b> <input style="width: 95%;" type="text"/> <b>Home Phone:</b> <input style="width: 95%;" type="text"/> <b>Cell Phone:</b> <input style="width: 95%;" type="text"/>	<b>Spouse's Full Name:</b> <input style="width: 95%;" type="text"/> <b>Soc. Sec. Number:</b> <input style="width: 95%;" type="text"/> <b>Date of Birth:</b> <input style="width: 95%;" type="text"/> <b>Occupation:</b> <input style="width: 95%;" type="text"/> <b>E-mail Address:</b> <input style="width: 95%;" type="text"/> <b>Home Phone:</b> <input style="width: 95%;" type="text"/> <b>Cell Phone:</b> <input style="width: 95%;" type="text"/>
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**Address:**

**City:**  **State:**  **Zip:**

Dependent Name <small>(First, Middle Initial, Last)</small>	Date of Birth	Dependent's Soc. Sec. Number	Relationship	Child Care	College Tuition
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	Y N	Y N
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**Were you a full year resident of Tennessee in 2020? Y N**  
**If not, please specify which other state(s) you lived in and if/when you moved.**

Last year, did you (or your spouse):	
Have any major purchases such as a vehicle? If yes, please provide purchase agreement.	Y N
Attend school as a full-time student?	Y N
Purchase supplies used as an educator? (teacher, teacher's aide, counselor)	Y N
Have Marketplace Insurance? If yes, please provide form 1095-A.	Y N
Make any retirement contributions?	Y N
Make any estimated tax payments? If yes, provide all dates and amounts.	Y N
If you are due a refund, would you like direct deposit?	Y N

Check Box if Direct Deposit Information is the same as last year.	Check Box for tax preparation fee to be drafted from same account when tax return is e-filed.
Bank: <input style="width: 95%;" type="text"/>	Routing #: <input style="width: 95%;" type="text"/>
Account #: <input style="width: 95%;" type="text"/>	

Please check how would like to receive your completed return. (Multiple options can be chosen.)	
Pick up at the office	Emailed (Password Protected)
Client Portal	Mail

Who may we thank for referring you?

**If you are a new client, you will need to provide a copy of your 2019 tax return.**