



MARITAL STATUS ☐ Single ☐ Married ☐ Married, Separated	NEW CLIENTS: HOW DID YOU HEAR ABOUT US?	WHO REFERRED YOU?
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◆ TAXPAYER INFORMATION

NAME (FIRST, INITIAL, LAST)			
SSN		DATE OF BIRTH	
LICENSE / STATE ID #	STATE	ISSUE DATE	EXP. DATE
OCCUPATION			
CELL PHONE		RECEIVE TEXTS? ☐ Yes ☐ No	
EMAIL ADDRESS			

◆ SPOUSE INFORMATION

NAME (FIRST, INITIAL, LAST)			
SSN		DATE OF BIRTH	
LICENSE / STATE ID #	STATE	ISSUE DATE	EXP. DATE
OCCUPATION			
CELL PHONE		RECEIVE TEXTS? ☐ Yes ☐ No	
EMAIL ADDRESS			

MAILING ADDRESS (STREET, APT #, CITY, STATE, ZIP)

◆ DEPENDENT INFORMATION

NAME (FIRST, INITIAL, LAST)	SSN	RELATIONSHIP	DATE OF BIRTH	MONTHS IN HOME	DISABLED ✓	STUDENT ✓
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐

◆ INCOME, EXPENSES & CIRCUMSTANCES Check all that apply

☐ Wages (W-2s)	☐ Child Support \$ _____	☐ Energy-Efficient Purchases
☐ Unemployment	☐ FIP / FIA / DHS Cash Benefits \$ _____	☐ Out-of-State Purchases
☐ Social Security Benefits	☐ Workers' Compensation \$ _____	☐ Being claimed as a dependent?
☐ Self-Employment (complete SE form)	☐ VA Benefits \$ _____	☐ Are you or your spouse disabled?
☐ 1099-K (personal or business)	☐ Charitable Donations \$ _____	☐ Moved during the year?
☐ Pensions & Annuities	☐ Child Care Expenses	☐ Lived or worked in the city?
☐ Interest Income	☐ College Tuition	☐ Injured spouse? If so, which spouse owes the debt?
☐ Dividends	☐ Student Loan Interest	_____
☐ Sale of Stocks	☐ Medical Expenses	
☐ Sale of Virtual Currency	☐ Mortgage Interest	
☐ Gambling Winnings	☐ Sale of Real Estate	
☐ Foreign Income	☐ Estimated Payments	



◆ **RENT INFORMATION** January 1 – December 31

RENTAL 1 · STREET ADDRESS (STREET, APT #, CITY, STATE, ZIP)		LANDLORD NAME & PHONE
MONTHLY RENT PAID \$	NUMBER OF MONTHS RENT PAID	ON LEASE? ☐ Yes ☐ No

RENTAL 2 · STREET ADDRESS (STREET, APT #, CITY, STATE, ZIP)		LANDLORD NAME & PHONE
MONTHLY RENT PAID \$	NUMBER OF MONTHS RENT PAID	ON LEASE? ☐ Yes ☐ No

◆ **HOMEOWNER INFORMATION**

Do you own a home you pay property taxes on?	☐ Yes ☐ No
Is this home your primary residence?	☐ Yes ☐ No
Did you provide physical copies of your property tax bills?	☐ Yes ☐ No
If no, what township did you live in so we can access them online? _____	

◆ **REFUND OPTIONS**

REFUND METHOD ☐ Direct Deposit ☐ Check by Standard Mail ☐ Prepaid Card ☐ Refund Advance	
BANK NAME	ACCOUNT TYPE ☐ Checking ☐ Savings
ROUTING #	ACCOUNT #
PREPARATION FEES PAID BY ☐ Cash ☐ Check ☐ Credit Card ☐ Deduct from Refund (additional fees apply)	

◆ **AUTHORIZATION**

By completing this form, you certify that you would like your taxes prepared according to the information provided above. All bank products are subject to bank fees and approval by the bank. Accurate Tax & Financials cannot promise or guarantee refund advances, as they are subject to underwriting approval. Accurate Tax & Financials is only a facilitator.

TAXPAYER SIGNATURE

DATE

SPOUSE SIGNATURE

DATE

REFER A FRIEND
EVERYONE WINS

\$25 CASH

for you, for every new customer you refer to Accurate Tax & Financials.

\$25 OFF

for your friend, discounted from their tax preparation fees.