

New Client Information Worksheet

Please complete the following (as applicable) and fax or e-mail back to me prior to your appointment. You will also need to complete the Annual Client Worksheet. Visit my web site (yourtaxreturn.com) and look under "What do I bring to my appointment?" so you know what other information to furnish. Dependents can be anybody - children, parents or others, regardless of age - whom you support and who do not claim their own exemption on their tax return. Thanks in advance!

_____ Address		_____ City, State, Zip		
_____ Best Contact Phone #	_____ 2nd Best Phone #	_____ Occupation - Self	_____ Occupation - Spouse	
_____ First Name	_____ Last Name	_____ Birth Date	_____ SSN	_____ Relationship
_____ Self	_____	_____	____ - ____ - ____	_____
_____ Spouse	_____	_____	____ - ____ - ____	_____
_____ Dependent 1	_____	_____	____ - ____ - ____	_____
_____ Dependent 2	_____	_____	____ - ____ - ____	_____
_____ Dependent 3	_____	_____	____ - ____ - ____	_____
_____ Dependent 4	_____	_____	____ - ____ - ____	_____
_____ Dependent 5	_____	_____	____ - ____ - ____	_____