



Tax Preparation Main Information Sheet

Listed is items that are needed in order for you to file your Income Tax Return:	-Photo ID -SSN Cards(You, Spouse, & Dependents) - Tax Documents (W2's, 1099's and Etc)
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Personal Info: (Please Print)

Tax Payer Name: _____ MI: _____ Last Name: _____

SSN: _____ DOB: _____ Email: _____

Spouse Name: _____ MI: _____ Last Name: _____

SSN: _____ DOB: _____ Email: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Home Phone: _____ Cell Phone: _____

CELL PHONE CARRIER: _____

Dependent Information – Do not include yourself or your spouse

Please list everyone who lived in your home and anyone living outside your home that you support

Name (First, Last, Middle Initial)	Date of Birth MM-DD-YY	Social Security	Relationship	Mths live with you	Full Time Student	Totally Disabled

1. Did you provide more than half of support for the dependents listed above? YES or NO

2. Have you ever had earned income credit disallowed by the IRS? YES or NO

3. Would you like for your refund to be direct deposit in your bank account? YES or NO

If Yes (You will need a voided check, deposit slip from check book, or a bank statement with your routing and account number)

How did you hear about Xpert Tax Service? _____

If someone referred you to Xpert Tax Service, please list their name below: (New Clients Only)

Referred By: _____

Please indicate that the information above is correct best to your knowledge:

Your Signature: _____ Spouse Signature: _____

Date: _____