

Client Profile

Primary Tax Filer's Information

Name as Shown on your Social Security Card:

Social Security #: _____

Occupation: _____

Date of Birth: _____

Work Phone: _____

Cell Phone: _____

Home Phone: _____

Did you have Health Insurance in 2016?

Yes _____ No _____ Part Year _____

Can anyone else claim you as a dependent?

Yes _____ No _____

Spouse Information – If applicable

Spouse's name as shown on their SS Card:

Social Security #: _____

Occupation: _____

Date of Birth: _____

Work Phone: _____

Cell Phone: _____

Did you have Health Insurance in 2016?

Yes _____ No _____ Part Year _____

Can anyone else claim you as a dependent?

Yes _____ No _____

What was your marital status on Dec 31st 2016?

Single _____ Married _____

Divorced/Separated _____ Widowed _____

If legally married but you were separated, did you live with your spouse during any part of the last 6 months of the year? Yes _____ No _____

Mailing Address:

If you are due a refund, would you like it directly deposited into your bank account? Yes _____ No _____

Bank Name: _____

Routing Number: _____

Account Number: _____

Were you or any of the dependents College Students for the tax year? Yes _____ No _____

If Yes did you receive a 1098T?

Did you earn income outside of WA? _____

Were you a resident of WA all year? _____

If NO, please list dates of residency in WA and other state(s): _____

Have you received any notices from the IRS or State Revenue office in 2016? _____

Did you buy or sell a house? Yes _____ No _____

Did you receive any W2's? Yes _____ No _____

Did you receive SS Benefits? Yes _____ No _____

Did you receive a 1099R? Yes _____ No _____

Did you receive a 1099SA? Yes _____ No _____

Did you receive a 1095A, B, C? Yes _____ No _____

Did you have any gambling winnings? Yes _____ No _____

Did you receive a 1099G? Yes _____ No _____

Did you receive a State refund? Yes _____ No _____

Did you sell any stock? Yes _____ No _____

Did you receive a 1099Misc? Yes _____ No _____

Did you pay / receive any Alimony? Yes _____ No _____

Did you contribute to an IRA/Roth? Yes _____ No _____

Did you pay on any student loans? Yes _____ No _____

Did you receive an ID Protection Pin? Yes _____ No _____