

Personal Information Worksheet

Please provide us current home & cell phone numbers!

Complete the personal information only if you are a new client or if your information has changed since Tax Year 2024. Please Note! New for 2025 you must provide banking information as the IRS is no longer issuing paper check refunds, nor accepting checks for payments!

<u>Taxpayer</u>	<u>Spouse</u>
First Name & M.I.:	First Name & M.I.:
Last Name:	Last Name if different:
Soc. Security #:	Soc. Security #:
Date of Birth:	Date of Birth:
Work Phone:	Work Phone:
Home Phone:	
Cell Phone:	Cell Phone:
Email Address:	Email Address:

Address: Street: _____ City: _____ St. _____ Zip _____

Children's Information:

Name:	SS#	DOB:	Grade
Name:	SS#	DOB:	Grade
Name:	SS#	DOB:	Grade
Name:	SS#	DOB:	Grade

Electronic, Direct Deposit Information

Tax refunds can be direct deposited into an IRA (traditional or Roth), a Health Saving Account (HSA), an Archer MSA, or a Coverdell education savings account. Please advise us if you are interested in any of these options, otherwise for bank direct deposits fill in below.

For Bank Direct Deposit Include: Bank Name, Routing Number, Checking or Savings, and Account Number.

Name of Bank: _____

Account # _____ **Circle One:** Checking or Savings

Routing # _____