

Today's Date _____

Time in: _____

Which Office did you visit today?

_____ 3415 Custer Rd Suite 195
Plano, TX 75023

_____ 9410 Walnut St. Suite 112
Dallas, TX 75243

Contact Information

Taxpayer's Information:

First Name: _____ Last name: _____

Occupation: _____ Date of Birth: _____

SSN/ITIN: _____ DL / ID: _____ State: _____

Phone #: _____ Email: _____

Home Address: _____ City: _____ Zip: _____

Spouse Information:

First Name: _____ Last name: _____

Occupation: _____ Date of Birth: _____

SSN/ITIN: _____ DL / ID: _____ State: _____

Phone #: _____ Email: _____

Filing Status: Single Married filing Joint Married Filing Separate Head of Household Window/er

Dependent Info:

Dependent name:	SSN/ITIN:	Date Of Birth:	Relationship:
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_____	_____	_____	_____
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(Don't Forget the Back)

All Tax Filers

- W-2 / W-2G and/or K-1 Income
- 1099 forms Income
- Prior Tax Return
- 1095-A form
- Do you work from home
- 1098- T / 1098-E Form
- Moving Expenses
- Tuition Expenses
- Medical/Dental Expenses
- Traditional Roth/ IRA
- Day Care Expenses
- Bought a Car

Home Owner (including rentals)

- 1098 - Mortgage Interest
- Refinance/Purchase
- Real Estate Tax
- Sold Home
- Energy Upgrades
- Insurance Premiums
- Rental Income
- Rental Expenses

So, we may better serve you.

- Have you ever been audited by the IRS?
- Was your Identity stolen with the Equifax and Experian Data breaches?
- Do you have questions about starting or growing a business?
- Are you satisfied with your credit score?
- Do you have a plan for retirement?
- Do you have a Will?

I _____ testify that all information provided is true and accurate to the best of my knowledge. I know that providing falsified information to my tax professional is a federal crime punishable by fines and or imprisonment.

Signature

Date

Signature

Date

Disclosure:

The information contained on this form is for the sole use of the above individual(s) or entities and may contain propriety, privileged and/or highly confidential information. Any unauthorized dissemination, review, or copying of these communications are strictly prohibited.