The TAX Office Inc.
Checking your bottom line.

NEW CLIENT FORM

1. Personal Information

Name		SSN	Date of Birth	Occupation	Phone
Tax Payer					
Spouse					

Street Address		City	State	Zip	Home Phone

Email Address

	Tax Payer	**Spouse**	**Marital Status**	
Blind	☐ Yes ☐ No	☐ Yes ☐ No	☐ Married	Will File Joint: ☐ Yes ☐ No
Disabled	☐ Yes ☐ No	☐ Yes ☐ No	☐ Single	
Pres. Campaign Fund	☐ Yes ☐ No	☐ Yes ☐ No	☐ Widow(er)	Date of Spouses Death: _____

2. Dependents (Children & Others)

Name (First & Last)	Relationship	Date of Birth	Months Lived With You	SSN	Disabled	FT Student	Deps. Gross Income	ID Protection PIN

3. Questions - Please answer the following questions to determine maximum deductions.

1. Are you self-employed or do you receive hobby income?	☐ Yes	☐ No	**6. Do you have a foreign bank account, trust or business?**	☐ Yes	☐ No
2. Did you receive income from raising animals or crops?	☐ Yes	☐ No	**7. Do you provide a home for or help support anyone not listed in Section 2 above?**	☐ Yes	☐ No
3. Did you receive rent from real estate or other property?	☐ Yes	☐ No	**8. Did you receive any correspondence from the IRS or State Department of Taxation?**	☐ Yes	☐ No
4. Did you receive income from gravel, timber, minerals, oil, gas, copyrights, or patents?	☐ Yes	☐ No	**9. Were there any births, deaths, marriages, divorces, or adoptions in your immediate family?**	☐ Yes	☐ No
5. Did you withdrawn or write checks from a mutual fund?	☐ Yes	☐ No	**10. Did you give a gift of more than $15,000 to one or more people?**	☐ Yes	☐ No

11. Did you have any debts cancelled, forgiven or refinanced? ☐ Yes ☐ No

12. Did you pay interest on a student loan for yourself, your spouse, or your dependent during the year? ☐ Yes ☐ No

13. Did you pay you expenses for yourself, your spouse or your dependent to attend classes beyond high school? ☐ Yes ☐ No

4. How did you hear about us?

☐ Road Sign

☐ Walk In

☐ Road Sign

☐ Returning Client (Previous Years)

☐ Other: _____

☐ **Refer-A-Friend**

Who referred you?

Name: _____

Were you referred to a specific preparer? _____