

Client Annual Data Form (Year 2011)

Date: _____

Telephone: _____

Name: _____

Email: _____

(1) Did you change your address since last tax season?

Yes__ No__ (if yes provide new address)

(2) Did your telephone number change?

Yes__ No__ (if yes provide new number)

(3) Do you want to ADD any dependents?

Yes__ No__ If yes, provide name, date of birth, social security # and a copy of the social security card for the dependent(s).

(4) Do you want to REMOVE any dependents?

Yes__ No__ If yes, provide name, date of birth, social security # for the dependent(s).

(5) Did you receive unemployment?

Yes__ No__

(6) Did you receive distribution from 401K?

Yes__ No__

(7) Did you receive distribution from IRA?

Yes__ No__

(8) Did you receive distribution from pension/Soc Sec?

Yes__ No__

(9) Did you Sell real estate in 2011? Yes__ No__

(10) Did you Purchase real estate in 2011? Yes__ No__

(11) Did you Refinance real estate in 2011? Yes__ No__

(If yes to 9, 10 or 11, provide copy of HUD1/Closing Statement)

(12) Did you get married/divorced/separated in 2011?

Yes__ No__

(13) Did you receive alimony in 2011?

Yes__ No__

(14) What was your monthly rent in 2011? _____ NA__

(15) How will you pay for services?

Advance payment (pay now) _____

Pay & pick -up (when completed) _____

Cash/Check__ Credit Card__ Debit Card__

Fees deducted from refund (extra bank fees are incurred) _____

(16) How would you like to receive your refund?

Refund Check (by mail in 2-4 weeks) _____

Direct Deposit (in your account in 2-3 weeks) _____

Refund Transfer (pick up check here 8-15 days)
**extra bank fees are incurred for this service _____

Refund Transfer (in your account 8-15 days)
**extra bank fees are incurred for this service _____

(17) Did your banking information change for direct deposit?

Yes__ No__ NA__

(If yes, please provide copy of voided check)

(18) Do you need this return for Financial Aid?

Yes__ No__

(19) Will this return be used for immigration purposes?

Yes__ No__

(20) Will this return be used to apply for a mortgage?

Yes__ No__

(21) How many jobs did you have in 2011? _____

(22) How would you like your client copies?

__Emailed __Paper Copy __Mailed

Notes/Comments: Thank you for taking the time to complete this form. It is a pleasure doing business with you.