



## CLIENT INFORMATION SHEET - TY 2024

<b>MARTIAL STATUS:</b> <input type="checkbox"/> <b>SINGLE</b> <input type="checkbox"/> <b>MARRIED</b> <input type="checkbox"/> <b>MARRIED SEPERATED</b>									
New clients, how did you hear about us?					Who referred you?				
<b>TAXPAYER INFORMATION</b>					<b>SPOUSE INFORMATION</b>				
Name <i>(First, Initial, Last Name)</i>					Name <i>(First, Initial, Last Name)</i>				
SSN		Date of Birth			SSN		Date of Birth		
Driver License/State ID #		State	ISS Date	Exp Date	Driver License/State ID#		State	ISS Date	Exp Date
Occupation					Occupation				
Cell Phone Receive Texts? <input type="checkbox"/> Yes <input type="checkbox"/> No					Cell Phone Receive Texts? <input type="checkbox"/> Yes <input type="checkbox"/> No				
E-Mail Address					E-Mail Address				
Mailing Address <i>(street, apt #, city, state, zip)</i>									
<b>DO ANY OF THE FOLLOWING CIRCUMSTANCES/INCOME/EXPENSES APPLY? (check all that apply)</b>									
<input type="checkbox"/> Being claimed as a <b>dependent</b> ?	<input type="checkbox"/> Dividends				<input type="checkbox"/> Medical Expenses				
<input type="checkbox"/> Are you or your spouse <b>disabled</b> ?	<input type="checkbox"/> 1099-K <i>(Personal or Business)</i>				<input type="checkbox"/> Student Loan Interest				
<input type="checkbox"/> <b>Moved</b> during the year?	<input type="checkbox"/> Interest Income				<input type="checkbox"/> Mortgage Interest				
<input type="checkbox"/> LIVED OR WORKED in the <b>city</b> ?	<input type="checkbox"/> Sale of Stocks				<input type="checkbox"/> Sale of Real Estate				
<input type="checkbox"/> Wages - W2's _____	<input type="checkbox"/> Child Care Expenses				<input type="checkbox"/> Charitable Donations \$ _____				
<input type="checkbox"/> Unemployment	<input type="checkbox"/> Child Support \$ _____				<input type="checkbox"/> Energy Efficient Purchases				
<input type="checkbox"/> Social Security Benefits	<input type="checkbox"/> FIP/FIA/DHS Cash Benefits \$ _____				<input type="checkbox"/> Out of State Purchases				
<input type="checkbox"/> Self-Employment <i>(Complete SE Form)</i>	<input type="checkbox"/> Worker's Compensation \$ _____				<input type="checkbox"/> Sale of Virtual Currency				
<input type="checkbox"/> Pension & Annuities	<input type="checkbox"/> VA Benefits \$ _____				<input type="checkbox"/> Estimated Payments				
<input type="checkbox"/> College Tuition	<input type="checkbox"/> Gambling Winnings				<input type="checkbox"/> Foreign Income				
	<input type="checkbox"/> Injured Spouse, if so which spouse owes the debt? _____								
<b>DEPENDENT INFORMATION</b>									
First Name, Initial, Last Name	Dependent's SSN	Relationship	# of months in home	Date of Birth	Disabled ✓	College Student ✓			
					<input type="checkbox"/>	<input type="checkbox"/>			
					<input type="checkbox"/>	<input type="checkbox"/>			
					<input type="checkbox"/>	<input type="checkbox"/>			
					<input type="checkbox"/>	<input type="checkbox"/>			
					<input type="checkbox"/>	<input type="checkbox"/>			

(Over)

NOTE: Tax Refunds with **Earned Income Tax Credit** and/or **Additional Child Tax Credit** will automatically be **DELAYED** by Law until **LATE February**. If you need money now, ask about our Same Day Advances from \$250 to \$7000

**PAYMENT OPTIONS**

Cash     Check     Credit Card     Deduct from Refund *(Additional Fees Apply)*

**REFUND OPTIONS**

Standard Mail     Direct Deposit     Refund Advance     Card     Check     Direct Deposit

Routing # \_\_\_\_\_

Account # \_\_\_\_\_

Bank Name \_\_\_\_\_

Checking     Savings

By completing this form, you certify that you would like your taxes prepared according to the information provided above. All bank products are subject to Bank fees and approval by the bank. Paula's Sav Tax Inc cannot promise or guarantee refund advances as they are subject to Bank underwriting approvals. Paula's Sav Tax Inc is only a facilitator.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**COMMENTS/NOTES**

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**REFER-A-FRIEND**

You receive \$20 **CASH** for referring a **NEW CUSTOMER** to Paula's Sav Tax Inc.  
Your friend will receive a \$20 **DISCOUNT** off our tax fees!