

Office use only

Date: _____

Client # _____

Name: _____

Portal Contact Email: _____

Preferred Contact Phone: _____

Taxpayer's DL #: _____

Issue date _____

Expiration date _____

Spouse's DL #: _____

Issue date _____

Expiration date _____

Bank Account: Same as last year? _____ YES (if yes, do not complete) _____ NO

Checking/Savings Bank Name _____

Routing # _____

Account# _____

I have returned my engagement letter:

_____ YES

_____ NO

_____ Do not know

When tax return is complete and ready for pick up please contact me by:

_____ Phone

_____ Email

NOTES:
