

XPERT TAX SERVICE

TAX PREPARATION MAIN INFORMATION SHEET

TAXPAYER INFORMATION (PLEASE PRINT):

SOCIAL SECURITY NUMBER: \_\_\_\_\_ DATE OF BIRTH: \_\_\_\_\_

FIRST NAME: \_\_\_\_\_ MI: \_\_\_\_\_ LAST: \_\_\_\_\_

EMAIL: \_\_\_\_\_

SPOUSE INFORMATION (PLEASE PRINT):

SOCIAL SECURITY NUMBER: \_\_\_\_\_ DATE OF BIRTH: \_\_\_\_\_

FIRST NAME: \_\_\_\_\_ MI: \_\_\_\_\_ LAST: \_\_\_\_\_

EMAIL: \_\_\_\_\_

CURRENT ADDRESS (PLEASE PRINT):

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP CODE: \_\_\_\_\_

MOBILE PHONE: \_\_\_\_\_ MOBILE PROVIDER: \_\_\_\_\_

HOME PHONE NUMBER: \_\_\_\_\_

Dependent Information – Do not include yourself or your spouse

Please list everyone who lived in your home and anyone living outside your home that you support

NAME: (First, Middle, Last) Print Exactly As Social Security Card Reads	Social Security No.	Date of Birth MM-DD-YY	Relationship	Full Time Student	Totally Disabled

1. Would you like for your refund to be direct deposited in your bank account? YES OR NO  
(If yes, you will need a voided check or a bank statement with your routing and account number)

2. How did you hear about Xpert Tax Service? \_\_\_\_\_

If someone referred you to Xpert Tax Service, please list their name below: (New Client Only)

Referred By: \_\_\_\_\_

Please indicate that the information above is correct best to your knowledge:

Your Signature: \_\_\_\_\_ Spouse Signature: \_\_\_\_\_

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

