

NEW CLIENT WORKSHEET

**PLEASE ATTACH A COPY OF BOTH TAXPAYER AND SPOUSE
DRIVERS LICENSE OR STATE ID**

Taxpayer

Spouse

Name:	Name:
Birthday:	Birthday:
Soc.Sec #	Soc.Sec #
Job Title:	Job Title:
Email:	Email:
Phone #	Phone #
Filing Status: Single Married Joint Married Separate Head of Household	

Address

WISCONSIN RENTERS ONLY

Rent Paid in 2023: Was Heat Included in the rent?

Dependents (please attach additional pages if needed)

Name	Social Security #	Birthday	Relationship	College Student	
				Yes	No
				Yes	No
				Yes	No
				Yes	No

Bank Account Direct Deposit Information

Bank Name	Routing Number	Account Number	Checking/Saving

