

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	

Is it ok to TEXT?

Address

WISCONSIN RENTERS ONLY

Rent Paid: 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

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- ## Additional Information