



1. Background Information:

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

A. Client:

- 1. Name: \_\_\_\_\_
- 2. Social Security Number: \_\_\_\_\_
- 3. Date of Birth: \_\_\_\_\_
- 4. U.S. Citizen? \_\_\_\_\_
- 5. Occupation: \_\_\_\_\_
- 6. Current Employer: \_\_\_\_\_
- 7. Current Work Location:
  - a. Municipality: \_\_\_\_\_
  - b. County: \_\_\_\_\_
- 8. Former Employer: \_\_\_\_\_
- 9. Former Work Location:
  - a. Municipality: \_\_\_\_\_
  - b. County: \_\_\_\_\_

B. Spouse:

- 1. Name: \_\_\_\_\_
- 2. Social Security Number: \_\_\_\_\_
- 3. Date of Birth: \_\_\_\_\_
- 4. U.S. Citizen? \_\_\_\_\_
- 5. Occupation: \_\_\_\_\_
- 6. Current Employer: \_\_\_\_\_
- 7. Current Work Location:
  - a. Municipality: \_\_\_\_\_
  - b. County: \_\_\_\_\_
- 8. Former Employer: \_\_\_\_\_
- 9. Former Work Location:
  - a. Municipality: \_\_\_\_\_
  - b. County: \_\_\_\_\_

C. Did Taxpayer/Spouse notify SSA of name change? \_\_\_\_\_

D. Dependents:

- 1. Name: \_\_\_\_\_ SSN: \_\_\_\_\_ DOB: \_\_\_\_\_
- 2. Name: \_\_\_\_\_ SSN: \_\_\_\_\_ DOB: \_\_\_\_\_
- 3. Name: \_\_\_\_\_ SSN: \_\_\_\_\_ DOB: \_\_\_\_\_
- 4. Name: \_\_\_\_\_ SSN: \_\_\_\_\_ DOB: \_\_\_\_\_

E. Current Address:

From: \_\_\_\_\_ To: \_\_\_\_\_

- 1. Street: \_\_\_\_\_
- 2. City: \_\_\_\_\_
- 3. Zip Code: \_\_\_\_\_
- 4. County: \_\_\_\_\_
- 5. Municipality: \_\_\_\_\_
- 6. School District: \_\_\_\_\_

F. Current Telephone Numbers:

Client: \_\_\_\_\_

- 1. Residence: \_\_\_\_\_
- 2. Work – Taxpayer: \_\_\_\_\_
- 3. Work – Spouse: \_\_\_\_\_
- 4. Other: \_\_\_\_\_
- 5. Email: \_\_\_\_\_
- 6. Email: \_\_\_\_\_

G. Former address:

From: \_\_\_\_\_ To: \_\_\_\_\_

- 1. Street: \_\_\_\_\_
- 2. City: \_\_\_\_\_
- 3. Zip Code: \_\_\_\_\_
- 4. County: \_\_\_\_\_
- 5. Municipality: \_\_\_\_\_
- 6. School District: \_\_\_\_\_

H. Refunds:

1. Direct Deposit?

- a. Checking Account: RTN: \_\_\_\_\_ Account #: \_\_\_\_\_
- b. Savings Account: RTN: \_\_\_\_\_ Account #: \_\_\_\_\_
- c. Retirement Account: RTN: \_\_\_\_\_ Account #: \_\_\_\_\_

I. Efile? \_\_\_\_\_

J. Allow the IRS to discuss tax return with ATI?

Yes: ____	No: ____
<u>Client</u>	<u>Spouse</u>

K. Any foreign bank or brokerage accounts?

- 1. Country: \_\_\_\_\_
- 2. Account Number: \_\_\_\_\_
- 3. Highest Balance During the Year: \_\_\_\_\_
- 4. Account Owner(s): \_\_\_\_\_
- 5. Financial Institution: \_\_\_\_\_
- 6. Type of Account: \_\_\_\_\_

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

L. Any outstanding tax issues with the IRS or other tax authorities? \_\_\_\_\_

M. Any disputes with prior accountant/tax preparer? \_\_\_\_\_

N. Engaged in divorce, custody or child support proceedings? \_\_\_\_\_

O. Sell a home in the curret tax year?