



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?