

MARTIN ACCOUNTING SERVICES, INC.

222 West Pointe Drive, Swansea, IL. 62226 --- 618-233-3000 --- fax 618-233-3003

New Client Information

Name: _____ Referred by: _____

Address: _____ DOB: _____

Occupation _____

Spouse: _____ DOB: _____

Occupation _____

Best way to reach you (please select preferred method of contact from drop down):

Home Phone Number: _____ Email Address: _____

Cell Phone (Taxpayer): _____ Cell Phone (Spouse): _____

1) Did you pay sales tax on any large ticket purchases such as a car, boat, home remodel in 2023? Yes No

2) Did you pay real estate taxes in your state during 2023? Yes No

If so, provide copy of tax bill or parcel number & county

3) Who else is authorized to pickup your tax return? _____

Due to federal privacy requirements, we cannot give out your tax return to someone else unless authorized to do so above.

4) I/We want direct deposit of any refund: Yes No

Please leave voided check for direct deposit

Bank Name: _____

Routing Number: _____

Account Number: _____

5) Claiming Dependents? Yes No

Name _____ Relationship _____ SSN _____ DOB _____

Name _____ Relationship _____ SSN _____ DOB _____

Name _____ Relationship _____ SSN _____ DOB _____

Name _____ Relationship _____ SSN _____ DOB _____

6) Did any members of your household have Market Place health insurance in 2023? Yes No

7) In an effort to reduce waste, we will send you an electronic copy of your return for tax year 2023. Please Indicate if you would instead prefer a bound copy by checking the box: ☐

8) Did you receive, sell, exchange or otherwise dispose of virtual currency in 2023? Yes No

9) Did you make estimated tax payments for tax year 2023? Yes No

If you answered yes, please provide your preparer with the exact amounts paid to the IRS or state.

Comments: _____

*****New clients please provide a copy of last tax return filed.*****