
Name: _____ Spouse: _____

Date of birth: _____ Date of birth: _____

Dependents Name(s): _____ Date of birth: _____
_____ Date of birth: _____
_____ Date of birth: _____

*please include social security number for NEW DEPENDENTS

Address: _____ Cell Phone: _____
_____ Email Address: _____

*If you have moved out of state, please list the date that you moved from your prior state _____

Driver's License # _____ State _____ Document # (NY Only) _____
License Issue Date: _____ License Expiration Date: _____

Spouse License # _____ State _____ Document # (NY Only) _____
License Issue Date: _____ License Expiration Date: _____

*Bank information is needed for refunds ~ if bank info. is the same as last year, check here:
Updated Bank Account # _____ Routing # _____

Payment Options

Cash, check, credit card, Venmo (@kevin-wilson-192), Zelle (TD account 5408)
Please note that payment must be submitted with your tax documents

Please check off how you will be arranging your payment: check Venmo Zelle
 cash credit card (see below)

You may list your credit card information below or call it into our office. Please include the card number, expiration date and security code.

****New Clients Only**** please include a copy of your 2020 Income Tax return
Also, kindly let us know who referred you to our office: _____