

**IMPORTANT NOTE:** Social Security numbers and names for each person on the tax return **MUST** match the listing in the Social Security Administration files (please, check your cards!).  
**The IRS WILL REJECT data related to persons without EXACT MATCHES, which will result in disallowed exemptions and deductions.**

CLIENT INFORMATION		
Filing Status	<input type="checkbox"/> Single <input type="checkbox"/> Married Filing Joint <input type="checkbox"/> Married Filing Separately <input type="checkbox"/> Head of Household <input type="checkbox"/> Qualifying Widow(er)	
<u>Taxpayer</u>  Primary contact for Tax Matters? <input type="checkbox"/> yes <input type="checkbox"/> no  Do you have a Foreign Bank Acct? <input type="checkbox"/> yes <input type="checkbox"/> no	First name and initial	
	Last name	
	Title/suffix	
	Social security number	
	Occupation	
	Date of birth (m/d/y)	
	Date of death (m/d/y)	
	Blind? (yes/no)	
<u>Spouse</u>  Primary contact for Tax Matters? <input type="checkbox"/> yes <input type="checkbox"/> no  Do you have a Foreign Bank Acct? <input type="checkbox"/> yes <input type="checkbox"/> no	First name and initial	
	Last name	
	Title/suffix	
	Social security number	
	Occupation	
	Date of birth (m/d/y)	
	Date of death (m/d/y)	
	Blind? (yes/no)	
Address	In care of	
	Mailing address	
	City	
	State	
	ZIP code	
	Country	
<u>Taxpayer Contact Information</u>  <input checked="" type="checkbox"/> Use check box to indicate best method of contact	<input type="checkbox"/> Home phone	
	<input type="checkbox"/> Work phone	
	<input type="checkbox"/> Mobile phone	
	<input type="checkbox"/> Fax number	
	<input type="checkbox"/> E-mail address	
<u>Spouse Contact Information</u>  <input checked="" type="checkbox"/> Use check box to indicate best method of contact	<input type="checkbox"/> Home phone	
	<input type="checkbox"/> Work phone	
	<input type="checkbox"/> Mobile phone	
	<input type="checkbox"/> Fax number	
	<input type="checkbox"/> E-mail address	