

Mark's Tax and Accounting Services

Tax Preparation Main Information Sheet

Listed is items that are needed in order for you to file your Income Tax Return:	-Photo ID -SSN Cards(You, Spouse, & Dependents) - Tax Documents (W2's, 1099's and Etc)
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Personal Info: _____ **Date:** _____

First Name: _____ **MI:** _____ **Last Name:** _____

SSN: _____ **DOB:** _____ **Email:** _____

Spouse Name: _____ **MI:** _____ **Last Name:** _____

SSN: _____ **DOB:** _____ **Email:** _____

Address: _____

City: _____ **State:** _____ **Zip Code:** _____

Home Phone: _____ **Cell Phone:** _____

Occupation: _____ **Filing Status:** _____

Dependent Information – Do not include yourself or your spouse

Please list everyone who lived in your home and anyone living outside your home that you support

Name	DOB	Social Security	Relationship	Mths live with you

1. Did you provide more than half of support for the dependents listed above? YES or NO

2. Have you ever had earned income credit disallowed by the IRS? YES or NO

3. Would you like for your refund to be direct deposit in your bank account? YES or NO

If someone referred you to Mark's Tax & Accounting Service, please list their name below: (New Clients Only)

Referred By: _____ **Method Payment:** Cash Check Fee from Refund
(\$35 Fee Extra)

Please indicate that the information above is correct best to your knowledge:

Signature: _____ **Spouse Signature:** _____