

Client Questionnaire for Civilians

To help us better serve you, please answer the following questions. All information requested is needed to complete your tax return and will be treated with strict confidence.

1. Taxpayer's Information (as it appears on the Social Security Card)

Name: _____, _____ SSN: _____ DOB: _____
 Lastname Firstname M.I. Suffix
Maiden Name: _____ Occupation: _____ Rank _____
State and County of Legal Residence: _____
Select one: U.S Citizen Resident Alien Non-Resident Alien

2. Spouse's Information (as it appears on the Social Security Card)

Name: _____, _____ SSN: _____ DOB: _____
 Lastname Firstname M.I. Suffix
Maiden Name: _____ Occupation: _____ Rank _____
State and County of Legal Residence: _____
Select one: U.S Citizen Resident Alien Non-Resident Alien

3.A Dependent's Information (excluding your Spouse)

Full Name (last, first, MI, suffix)	Birth Date (M/D/Y)	SSN or ITIN
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

3. B Did you pay for Child Care: _____ Child Care Provider's Name: _____
SSN or EIN: _____ Address: _____
Amount you paid: _____

4. Your Present Mailing Address: _____

5. Your Contact Details: home phone: _____ cell: _____
E-Mail address: _____

6. Single Married Divorced Legally Separated

7. Filing Status for this year: _____
(S=Single, MFJ=Married Filing Joint, MFS=Married Filing Separate, HH=Head of Household, QW=Qualified Widow)

8. Refund Type: Check or Direct Deposit: Routing# _____ Account# _____

9. If you or your spouse have Foreign Income:
Dates went to the US: _____ Dates returned: _____

10. **Date you moved overseas:** _____
Are you a permanent resident in that foreign country? If yes, since when: _____

11. **Which state tax return did you file last year:** _____

12. **Did you ... : (circle if applicable)**
receive... Social Security, Pension, Interest, Dividends,
paid... Student Loans
sold any stocks or funds?

13. **Do own rental property:**
Address: _____
Date you started renting it out: _____ **Amount you bought the house for:** _____

Expenses you had on the rental property during the year:

14. **Did you make any IRA contributions:** taxpayer or spouse
traditional or Roth, if so, how much:

Signature: _____
Date: _____