

SCHOPPE'S Tax Service, Inc.

CAMERON TX 76520

2017 "NEW" TAX CLIENT INFORMATION FORM

Personal Information: (We need Copies of Social Security Cards for Proper IRS/SS Matching)

Taxpayer Name: _____ SSN: _____

Date of Birth: _____ Taxpayers Occupation: _____

Spouses Name: _____ SSN: _____
(Name as listed on Social Security Card)

Date of Birth: _____ Spouses Occupation: _____

Address: _____

City: _____ State: _____ Zip: _____

Home Phone: _____ Cell Phone: _____ Business: _____

E-Mail Address _____

Your Filing Status, AS OF DECEMBER 31ST. Please Check One:

Single Married Filing Joint Married Filing Separate Head of Household

Your Dependents: (We need Copies of Social Security Cards for Proper IRS/SS Matching)

Name: _____ SSN: _____ Date of Birth: _____

Relationship: _____ Months lived with you 2017? _____

Name: _____ SSN: _____ Date of Birth: _____

Relationship: _____ Months lived with you 2017? _____

Name: _____ SSN: _____ Date of Birth: _____

Relationship: _____ Months lived with you 2017? _____

Name: _____ SSN: _____ Date of Birth: _____

Relationship: _____ Months lived with you 2017? _____

Foreign Account Questions for Tax Return

Did you or your spouse have interest in or signature over a **FOREIGN FINANCIAL ACCOUNT**?

Yes No

Did you receive a distribution from or were grantor of, or transferor to, a **FOREIGN TRUST**?

Yes No

Direct Deposit or Direct Debit Request:

***If your tax return shows a tax refund, would you like to have the refund Direct Deposited into your checking or savings account at your bank for faster and more secure delivery? Yes No**

***If your tax return shows a tax amount due, would you like to schedule the tax payment by directly debiting your checking or savings account at your bank for processing on the date due? This process ensures your payment is processed on the day it is due and eliminates the possibility of the payment being mishandled at the IRS Service Center. Yes No**

We will need a VOIDED Check from your bank that shows the Banks Name and the Routing and Account Numbers.

DRIVERS LICENSE: A response regarding Drivers License or State Identification for E-filing is now mandatory. Please check the appropriate box indicating your compliance.

Driver's License submitted for verification:	Taxpayer	Spouse
I do not have a Driver's License or State Identification:	Taxpayer	Spouse
I did not provide a Driver's License or State Identification:	Taxpayer	Spouse

Signature: _____ **Date:** _____
(Taxpayer)

Signature: _____ **Date:** _____
(Spouse)

**Payment for services is expected at the time your tax return is picked up.
THANK YOU FOR CHOOSING OUR FIRM FOR YOUR PROFESSIONAL TAX NEEDS**