

# SCHOPPE'S Tax Service, Inc.

CAMERON TX 76520

## 2016 "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 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 31<sup>ST</sup>. 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 2016? \_\_\_\_\_

Name: \_\_\_\_\_ SSN: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Relationship: \_\_\_\_\_ Months lived with you 2016? \_\_\_\_\_

Name: \_\_\_\_\_ SSN: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Relationship: \_\_\_\_\_ Months lived with you 2016? \_\_\_\_\_

Name: \_\_\_\_\_ SSN: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Relationship: \_\_\_\_\_ Months lived with you 2016? \_\_\_\_\_

**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.**

Signature: \_\_\_\_\_  
(Taxpayer)

Date: \_\_\_\_\_

Signature: \_\_\_\_\_  
(Spouse)

Date: \_\_\_\_\_

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**