



Griffin Accounting®

Remember — Its your money, NOT the IRS®

Date / /
DROP #
-

OFFICE USE	License Scanned BOTH if MFJ	Social Security Card Scanned for NEW children
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Home: _____ Cell: _____ Email: _____

Married
 Single
 Married, filing separated
 Widowed (*in last 2 yrs*)
 Head of Household w/dependent
REQUIRED Spouses information

****RETURNING CLIENTS** please MARK ANY CHANGES in following:
ANY changes to DIRECT DEPOSIT? YES NO

Taxpayer: _____ **Spouse:** _____
Date of Birth: _____ Date of Birth: _____
Name: _____ Name: _____
Address : _____ Address: (*if different*) _____

Social Security #: _____ Social Security #: _____
PLEASE CHECK if you want your returned mailed back \$10.00 Fee OR you will pick up

Can anyone else claim you as a dependant? NO YES (if YES WHO claims you) _____

Do you have any dependents to claim on your return?

YES (complete below) NO I do not know if they qualify as a dependent

Name (as it appears on SS Card)	Social Security #	Date of Birth	College Yes/No	Child Care Yes/No	Medical Coverage Yes/No
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

List anyone else in household

Medical Coverage: YES NO (all year) 1095-A, COPY NEEDED

Housing: (check ALL that apply)

- Property Tax Rent
- Refinance (closing documents)
- Purchased a New Home (closing documents)

Business or Rental: (check ALL that apply)

- Taxes
- Insurance
- Expenses

NEW DROP CLIENTS NEED: Copy of last tax return ALL W-2/1099 for year

CHOOSE REFUND TYPE Direct Deposit or Mailed Check

Name of BANK _____
Account Number _____

***** **NOTE: IRS QUESTIONS** *****

1. Any foreign bank accounts? YES NO 2. Any virtual currency? YES NO
3. Did you RECEIVE any Unemployment? YES NO 4. Any 401K WITHDRAWAL(s)? YES NO
5. Did you RECIEVE a STIMULUS check(s)? IF YES AMOUNT _____ received.
6. Did you defer any PAYROLL TAXES? YES NO 7. Any CASH DONATIONS? YES NO

If you are a NEW CLIENT, how did you hear about us? INTERNET ___ FB ___ Yellow Pages ___ Billboard ___
___ Referred by a friend (please tell us their name) _____ Other _____