

**CLIENT INFORMATION 2018**  
**PLEASE PRINT**

**SECTION A: Personal Information (Thank you for completing ALL information requested)**

	<u>Taxpayer</u>	<u>Spouse</u>
Legal Name:		
Occupation:		
Date of Birth:		
Social Security #:		
Home Phone:		
Work Phone:		
Cell Phone:		
Mailing Address:		
	City:	State: Zip Code:

**SECTION B: Dependent(s)**

Full Legal Name	Social Security #	Date of Birth	Relationship

**SECTION C: Were you or your dependent(s) enrolled in college in 2018?**

Student Name	1098-T Provided to us?	Freshman, Sophomore, Junior or Senior?

Did you use your vehicle for business or rental purposes in 2018?    YES    NO  
 If you sold any Real Estate in 2018, please provide documentation.  
 If you have a refund and wish to have it Direct-Deposited, please provide a copy of a check

Purchase price of items bought without Alabama sales tax \_\_\_\_\_

It is our policy to E-file all returns, if possible.  
 If you would prefer to mail in your returns, please check here.   

Please sign:

Taxpayer \_\_\_\_\_ Date \_\_\_\_\_

Spouse \_\_\_\_\_ Date \_\_\_\_\_

**\*\*PLEASE NOTE: WE CANNOT BEGIN PREPARATION OF YOUR TAX RETURNS  
 UNTIL THIS FORM IS RETURNED TO US**