

IMPORTANT NOTE: Social Security numbers and names for each person on the tax return **MUST** match the listing in the Social Security Administration files (please, check your cards!).
The IRS WILL REJECT data related to persons without EXACT MATCHES, which will result in disallowed exemptions and deductions.

CLIENT INFORMATION		
Filing Status	<input type="checkbox"/> Single	
	<input type="checkbox"/> Married Filing Joint	
	<input type="checkbox"/> Married Filing Separately	
	<input type="checkbox"/> Head of Household	
	<input type="checkbox"/> Qualifying Widow(er)	
Taxpayer Primary contact for Tax Matters? <input type="checkbox"/> yes <input type="checkbox"/> no Do you have a Foreign Bank Acct? <input type="checkbox"/> yes <input type="checkbox"/> no	First name and initial	
	Last name	
	Title/suffix	
	Social security number	
	Occupation	
	Date of birth (m/d/y)	
	Date of death (m/d/y)	
Spouse Primary contact for Tax Matters? <input type="checkbox"/> yes <input type="checkbox"/> no Do you have a Foreign Bank Acct? <input type="checkbox"/> yes <input type="checkbox"/> no	First name and initial	
	Last name	
	Title/suffix	
	Social security number	
	Occupation	
	Date of birth (m/d/y)	
	Date of death (m/d/y)	
Address	In care of	
	Mailing address	
	City	
	State	
	ZIP code	
	Country	
Taxpayer Contact Information <input checked="" type="checkbox"/> Use check box to indicate best method of contact	<input type="checkbox"/> Home phone	
	<input type="checkbox"/> Work phone	
	<input type="checkbox"/> Mobile phone	
	<input type="checkbox"/> Fax number	
	<input type="checkbox"/> E-mail address	
Spouse Contact Information <input checked="" type="checkbox"/> Use check box to indicate best method of contact	<input type="checkbox"/> Home phone	
	<input type="checkbox"/> Work phone	
	<input type="checkbox"/> Mobile phone	
	<input type="checkbox"/> Fax number	
	<input type="checkbox"/> E-mail address	