

Date \_\_\_\_\_

Referred By \_\_\_\_\_

George S. Magas, CPA  
Client Information – 2019 tax returns



\*\*\* If a New Client – Please include your 2018 tax return. \*\*\*

Please fill this out – so that we can update our database

<u>Name</u>	<u>Social Security #</u>	<u>Birth Date</u>	<u>Occupation</u>	<u>Questions?</u>
Taxpayer: _____	____-____-____	____/____/____	_____	<input type="checkbox"/>
Spouse: _____	____-____-____	____/____/____	_____	<input type="checkbox"/>
Address _____				
Do you want your refund direct deposited? <b>Bank Name</b> _____, <b>Routing Number</b> <input type="text"/>				
<b>Bank Account</b> <input type="text"/>				
<b><u>Taxpayer:</u></b>		<b><u>Spouse:</u></b>		
<input type="checkbox"/> Home: _____	<input type="checkbox"/> Home: _____			
<input type="checkbox"/> Cell: _____	<input type="checkbox"/> Cell: _____			
<input type="checkbox"/> Work: _____	<input type="checkbox"/> Work: _____			
<input type="checkbox"/> Email: _____@_____	<input type="checkbox"/> Email: _____@_____			
<b><u>** Please check above for the best way to reach you if we have questions.</u></b>				
<b><u>Dependents:</u></b>				
<u>Name</u>	<u>Social Security #</u>	<u>Birth Date</u>	<u>College Student (please check)?</u>	
_____	____-____-____	____/____/____	<input type="checkbox"/>	
_____	____-____-____	____/____/____	<input type="checkbox"/>	
_____	____-____-____	____/____/____	<input type="checkbox"/>	
_____	____-____-____	____/____/____	<input type="checkbox"/>	