

Income Tax Client Information

2013 Annual Form

Filing Status: *Married filing Jointly* _____ *Married filing Separately* _____
Single _____ *Head of Household* _____

Taxpayer Name: _____ **Occupation:** _____

Address: _____ **City/State/Zip:** _____

Date of Birth: ____ - ____ - ____ **SSN:** _____

Home Phone: _____ **Cell Phone:** _____ **Work Phone:** _____

Email: _____ **Fax:** _____

Driver's License info: State _____ Number _____ Expiration Date _____

Spouse Name: _____ **Occupation:** _____

Address: _____ **City/State/Zip:** _____

Date of Birth: ____ - ____ - ____ **SSN:** _____

Home Phone: _____ **Cell Phone:** _____ **Work Phone:** _____

Email: _____ **Fax:** _____

Driver's License info: State _____ Number _____ Expiration Date _____

Recently: Married _____ Divorced _____ Spouse Died _____, date applicable: ____ - ____ - ____

Dependent Children: *(Please denote if previous dependents are no longer applicable)*

<i>New Dependent? Y or N</i>	<i>Name</i>	<i>Birth date</i>	<i>Grade</i>	<i>SSN</i>	<i>Student; List school district</i>

*****If you have any dependents listed above, please complete Schedule EIC (Earned Income Credit) form included in packet*****

Related Business Activities:

Name of Business: _____ **Is business new in 2013?** [] Yes [] No

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Name of Business: _____ **Is business new in 2013?** [] Yes [] No

Have you received any correspondence from the IRS (Internal Revenue Service), Texas Comptroller's Office, and/or the Secretary of State? If so, please provide a copy of the letter and explain in detail:

Did we did prepare your 2012 tax return? Yes ___ No ___

*****If no, please provide us with a copy of the 2012 and 2011 tax returns*****

Would you like to have a scheduled appointment with CPA when your return is ready to be picked up?

Yes No If yes, with Blake M. Briscoe, CPA or Derek W. Criswell, CPA

E-COLLECT: Yes ___ \$17 No ___ \$0. Our fee for preparing your return will be deducted from your refund prior to it being deposited directly in your account. *Please provide us with a voided check for banking information.*

E-FILE: Mail your refund to you? Yes ___ No ___ Direct deposit? Yes ___ No ___
Load on Visa Prepaid Card? Yes ___ No ___

Please provide us with a voided check for banking information if you choose direct deposit.

Yes ___ No ___ Would you like to receive a notification for any key changes (processed, accepted, etc.)?

If so, select any of the following notifications:

Text message Email notification Automated voice message

Yes ___ No ___ Would you like for Blake M. Briscoe, CPA, P.C. be listed as an alternate contact?

Yes ___ No ___ Would you like to contribute \$3.00 to the Presidential Campaign contribution?