

<b>Tax Payer Information:</b>	<b>How did you Hear about Us-</b> _____
Full Legal Name- _____	Social Security #- _____
Phone Number- _____	Email Address- _____
Occupation- _____	Birthdate- _____

<b>Spouse Payer Information:</b>	<b>If filing separate are they Itemizing?</b> _____
Full Legal Name- _____	Social Security #- _____
Phone Number- _____	Email Address- _____
Occupation- _____	Birthdate- _____

Address-street \_\_\_\_\_ P O Box \_\_\_\_\_ Apt. \_\_\_\_\_  
 City- \_\_\_\_\_ State- \_\_\_\_\_ Zip code- \_\_\_\_\_

**Dependents**

Name- _____	SSN#- _____	Birth- _____	relation _____	mo. In home- _____
Name- _____	SSN#- _____	Birth- _____	relation _____	mo. In home- _____
Name- _____	SSN#- _____	Birth- _____	relation _____	mo. In home- _____
Name- _____	SSN#- _____	Birth- _____	relation _____	mo. In home- _____
Name- _____	SSN#- _____	Birth- _____	relation _____	mo. In home- _____
Name- _____	SSN#- _____	Birth- _____	relation _____	mo. In home- _____

**Would you like your refund into your bank Account** Yes \_\_\_\_\_ No \_\_\_\_\_ Checking \_\_\_\_\_ Savings \_\_\_\_\_  
 Routing \_\_\_\_\_ Account \_\_\_\_\_ Bank \_\_\_\_\_

W2's \_\_\_\_\_ 1099's \_\_\_\_\_ Interest forms \_\_\_\_\_ Mortgage forms \_\_\_\_\_ Market place Ins. \_\_\_\_\_ HSA \_\_\_\_\_

Pay a lot of medical bills \_\_\_\_\_ purchase new vehicle \_\_\_\_\_ Rv make payments on \_\_\_\_\_ Sell Stocks \_\_\_\_\_

Put money in a IRA/Roth IRA \_\_\_\_\_ do you own a Business \_\_\_\_\_ Did you Itemize last year \_\_\_\_\_

Any charity \_\_\_\_\_ did you receive the third stimulus \_\_\_\_\_ did you receive advance payment \_\_\_\_\_

Did you Pay daycare \_\_\_\_\_ any energy efficient property \_\_\_\_\_ Did you have any college expenses \_\_\_\_\_

<input type="checkbox"/>	Do you Agree that you have been truthful with all information you have given In & Out Tax!
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<input type="checkbox"/>	Do you understand that we will keep copies of all your information safely locked up for 7 years!
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<input type="checkbox"/>	Do you understand we will do our best to do your return correctly and will help you with the IRS/ state, keep your taxes for 7 years locked up safely, and not share your information with any one.
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Tax Payer Signature- _____	Date- _____
Spouse's Signature- _____	Date- _____

filing status	<b>Staff use only</b>	Tooele _____	Millcreek _____
Single	Head of household	Federal refund/Owe _____	UT refund/owe _____
Married FJ	Qualifying widow/widower		
Married filing separate	Fees _____	Other refund/owe _____	