

Date

Referred By

George S. Magas, CPA
Client Information – 2021 tax returns



*** If a New Client – Please include your 2020 tax return. ***

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

Name **Social Security #** **Birth Date** **Occupation** **Questions?**

Taxpayer: _____ - - - - ___/___/___ _____

Spouse: _____ - - - - ___/___/___ _____

Address _____

Do you want your refund direct deposited? **Bank Name** _____, **Routing Number**

Bank Account

Taxpayer:

Spouse:

Home: _____ - - - -

Home: _____ - - - -

Cell: _____ - - - -

Cell: _____ - - - -

Work: _____ - - - -

Work: _____ - - - -

Email: _____ @ _____

Email: _____ @ _____

**** Please check above for the best way to reach you if we have questions.**

Dependents:

Name **Social Security #** **Birth Date** **College Student (please check)?**

_____	_____ - - - -	___/___/___	<input type="checkbox"/>
_____	_____ - - - -	___/___/___	<input type="checkbox"/>
_____	_____ - - - -	___/___/___	<input type="checkbox"/>
_____	_____ - - - -	___/___/___	<input type="checkbox"/>