

## Taxpayer Information Sheet

**Name(s)** \_\_\_\_\_

(as they appear on your recent tax return)

**Street:** \_\_\_\_\_

**City, State, Zip:** \_\_\_\_\_ **County:** \_\_\_\_\_

**Land line ONLY** (if we may contact you here): \_\_\_\_\_

### **Taxpayer**

**Date of birth:** \_\_\_\_\_

**Social Security Number:** \_\_\_\_\_

**Cell phone** (if we may contact you here): \_\_\_\_\_

**Email** (if we may contact you here): \_\_\_\_\_

**Work phone** (if we may contact you here): \_\_\_\_\_

**Occupation:** \_\_\_\_\_

### **Spouse**

**Date of birth:** \_\_\_\_\_

**Social Security Number:** \_\_\_\_\_

**Cell phone** (if we may contact you here): \_\_\_\_\_

**Email** (if we may contact you here): \_\_\_\_\_

**Work phone** (if we may contact you here): \_\_\_\_\_

**Occupation:** \_\_\_\_\_

Is there someone else we should call to discuss your tax return instead of the person(s) listed above?    Yes    No

If yes: Other Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Other Phone or Email Address: \_\_\_\_\_

Dates not available to answer questions or pick up your return: \_\_\_\_\_

Additional Information (alternate address to use, documents you are waiting for, etc.):

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### Dependent Information

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_ Son Daughter

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_ Son Daughter

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_ Son Daughter

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_ Son Daughter

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_ Son Daughter

**If you do not currently have a secure portal with Nelson Tax & Accounting, can we set you up with one?** \_\_\_\_\_ Yes \_\_\_\_\_ No

If yes, which email address should we use? \_\_\_\_\_ See section below.

### **Clients with portal access:**

\_\_\_\_\_ Check here if you would like only a digital copy of your completed tax return and Action Items exclusively in your portal. If you require a paper copy at a later time, there will be an additional charge of \$20, plus postage if needed.

### **Did you sign, date, and include the following forms included in the packet?**

Engagement Letter	_____ Yes
Taxpayer Information Sheet	_____ Yes
Bank Information Form	_____ Yes
Mandatory Questionnaire	_____ Yes
Organizer	_____ Yes
Consent to Use	_____ Yes