



# Business & Tax Consultants, Inc.

## New Client Information

**Taxpayer:** \_\_\_\_\_  
Name Date of Birth Social Security Number (if not on copy of tax return.)  
(The "Taxpayer" is the first person listed on a joint return.)

**Spouse** \_\_\_\_\_  
Name Date of Birth Social Security Number (if not on copy of tax return.)

**Dependent** \_\_\_\_\_  
Name Date of Birth Social Security Number (if not on copy of tax return.)

**Dependent:** \_\_\_\_\_  
Name Date of Birth Social Security Number (if not on copy of tax return.)

**Dependent:** \_\_\_\_\_  
Name Date of Birth Social Security Number (if not on copy of tax return.)

**Which person should we contact: Taxpayer Spouse Either Both (Circle One)**

The best way for us to become familiar with your tax situation is to review your two most recently filed returns. Please bring copies of your last returns.

**Address:** \_\_\_\_\_  
(If different from return provided)

**Phone(s)** \_\_\_\_\_

**E-mail(s)** (if you use them) \_\_\_\_\_

We are now required to verify **social security cards** for everyone on the return—including children. Many states are asking for driver's license or state id information for both spouses. You may decline to give your DL information. The purpose is to help prevent someone else filing a return using your information.