



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.)

If either spouse is divorced AND alimony is paid or received OR there are minor children whose custody is covered by a court order, please **check here** and bring us a copy of the order.

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) _____ **Email(s)** _____

We are now required to verify **social security cards** for everyone on the return—including children. New York state is asking for driver's licenses 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.