



Tax Preparation Form

E: info@alexander.financial

W: www.alexander.financial

TAX PREPARER: _____

CLIENT INFORMATION

Referred By: _____

Please complete this form as accurately as possible. The information provided is used to prepare your tax return and/or your free consultation.

**Incorrect information can delay your return or cause a rejection by the IRS.*

The following items must be included with this form for your return to be processed.

- Driver's License/Government Issued ID
- Social Security Cards (Taxpayer, spouse & all dependents)
- Income Documents (W2's, 1099's, K1's etc.)
- Other Documents (Student Loans, Mortgage Interest, Health Insurance info)

Name: _____

Spouse Name: _____

SS#: _____ D.O.B: _____

Spouse SS#: _____ D.O.B: _____

DL#: _____

Spouse DL#: _____

State: _____ Iss: _____ Exp: _____

State: _____ Iss: _____ Exp: _____

Address: _____ City: _____ ST: _____ ZIP: _____

Primary Phone: _____ Spouse Phone: _____ Work: _____

Email: _____

Spouse Email: _____

Occupation: _____

Spouse Occupation: _____

Dependent Name	DOB	SSN	Relationship	Mo. In Home	FT College Student
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

Signature: _____ Date: _____ Spouse Signature: _____ Date: _____