Hurst, Kelly and Company LLC

Express Tax Year 2020 Form 1040 Client Intake Form (in Lieu of Completed Tax Organizer)

Date Information Initially Received: ____________________

New Client Note - If you have filled out the 2020 Tax Organizer there is no need to complete this sheet.

Taxpayer Information		Spouse Information	
Last Name:	____________	Last Name:	____________
First Name:	____________	First Name:	____________
Middle Initial:	____________	Middle Initial:	____________
Taxpayer DOB:	____________	Spouse DOB:	____________
Taxpayer SS#:	____________	Spouse SS#:	____________
Occupation:	____________	Occupation:	____________
Taxpayer Cell:	( ) ____________	Spouse Cell:	( ) ____________
Taxpayer Email:	____________	Spouse Email:	____________

Address: ______________________________ Apt Number: __________

City: ______________________ State: ________ Zip Code: __________

Directly Deposit Refunds? Yes No

Account Routing Number: ____________ Account #: ____________

Do You Live Within City Limits? Yes No City: ____________________

Driver's License/State Issued ID

	Taxpayer	Spouse
Issuing State:	____________	____________
License Number:	____________	____________
Date Issued:	____________	____________
Expiration Date:	____________	____________

Dependent Information

First Name	Last Name	MI	SS#	DOB	Relationship	Child Care Expense	Tuition Expense

Information Received: DROP OFF CLIENT MEETING DROP BOX MAIL EMAIL OTHER__________
(for office use only)