##

# Welcome

# To

# New Order Tax Service

 *Thank you for allowing us to put your taxes in a New Order 4 U!!!*

|  |
| --- |
| Client Information |
| Full Name: |  |  |  |
|  Last | First | M.I. |
| Address: |  |  |
|  | Street Address | Apartment/Unit # |
|  |  |  |  |
|  | City | State | ZIP Code |
| Contact: | ( ) | Social Security Number: |  |
| Date of Birth: |  Email: |
|  |
| Tax Information |
|  |
| 1. Are you a: |
| [ ]  | New Customer | [ ]  | Referred Customer  |
| [ ]  | Returning Customer |  | *(if referred list source)* | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 2. Payment Type |
| [ ]  | Cash | [ ]  | Check [ ]  No Up-Front option(see #3) |
| 3. Would you like your refund direct deposited into your bank account? If so, please provide: Financial Institution Routing Number (RTN) & Account Number (DAN) |
| RTN: |  | DAN: |  |
| [ ]  | Checking\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | [ ]  | Savings\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  |
| 4. Which filing method will you use for this years’ returns? |
| [ ]  | Refund Transfer (7-10**)** **No upfront option\*****(This is a BANK PRODUCT)** | [ ]  | Electronic Filing\* (additional charges apply) |  |
|  |  |  |  |  |  |  |
| 5. Your filing status: |
| [ ]  | Single (no dependents) | [ ]  | Head of Household *(at least 1 dependent)* |
| [ ]  | Married, filing separately | [ ]  | Married, filing jointly |

|  |  |  |  |
| --- | --- | --- | --- |
| [ ]  | YES | [ ]  | NO  |

**6. Are there any problems or notices/letters that you received from IRS?**

**(OVER)**

7. Please list your spouse/ dependent(s) information:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First Name** | **Last Name** | **Date of Birth** | **Social Sec #**  | **Relationship** | **Day Care (attach receipt)** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

8. Did you receive unemployment benefits in 2018? **YES OR NO**

 If yes, list start/ end date?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

9. Do you have any unpaid IRS debt, child support, Student Loans, Military or Bank Product loan that is delinquent?

 **YES OR NO** If yes, which and how much?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

10. Did you or any of your dependents attend college or formal training during 2018. If so, please provide loan amount and/ or qualified tuition and fees and list any out-of-pocket expenses such as books, materials, or supplies.

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Attendee** | **School Name/ Location** | **Tuition/ Fees** | **Interest** |
|  |  |  |  |
|  |  |  |  |

11. Please list housing information.

|  |  |
| --- | --- |
| **RENTERS** | **HOMEOWNERS** |
| Current rent/lease: $ per month  | Mortgage interest: $ |
| *If you moved during 2018, please list previous rent:* | Real Estate/Property taxes: $ |
| # of months: \_\_\_\_\_\_\_\_ Amount per month: $\_\_\_\_\_\_\_ | Mortgage premiums/points: $ |

12. Do you have a GAS bill in your name? If so, yearly amount? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

13. Driver’s License OR State ID#:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Expires:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

14. Comments:

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Payment is due at time of service. If for any reason, payment is not received, an ACH will be issued or legal actions will be pursued to acquire payment.***

***Thank you for doing business with NEW ORDER!!!***

***\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

**Client Signature Date**