## 

# 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**