

# E-File Questionnaire 2020

**PLEASE PRINT CLEARLY**

*All information pertaining to your current tax return must be filled in.*

New IRS regulations beginning January 1, 2010 require us to notify our clients of the following information: We do not disclose any personal information to anyone and for your protection we will not release any information via phone, fax or mail without a written release form from you for each request. Check one answer for each question.

Yes	No	Question
		Do you have any foreign bank accounts?
		Does the paperwork turned in for income tax preparation include all income and expenses?
		Have you ever been denied Earned Income Tax Credit by the IRS in the last 3 years?

## **Taxpayers** - *All information must be identical to Social Security records.*

	Mr. Taxpayer	Ms Taxpayer
Name		
SS#		
Occupation		
Date of Birth		
Phone Number		
Filing Status – Single, Married filing Joint, Married Filing Separately, HOH (Circle One)		

## **Dependents** - *All information must be identical to Social Security records.*

Name	SS Number	Date of Birth	Relationship

**E-Mail Address:** \_\_\_\_\_

**Direct Deposit Information**    YES    NO

Bank Name:	
Routing Number:	
Account Number:	

Tax Year: 2020

Because of the new requirements by the Internal Revenue Service, I understand that I must have receipts for all deductions claimed on my tax return in case of an audit. I also understand that I must have receipts to go with cancelled checks.

By signing this statement, I understand that I am responsible for all figures given to my tax preparer and he is waived of any liability from the figures that I have given him.

I have provided proof of all dependents that I am claiming Earned Income credit for.

I understand that my tax return will not be submitted to the IRS until my entire preparation fee has been paid. **NO CREDIT FOR ANYONE.**

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

**Your Current Address that you want on Tax Return**

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

A copy of your tax return will be emailed to you – save a copy to your computer or print a copy – additional emails will cost you \$50. The password is the taxpayer's complete social security number without the dashes. If I can not read your email address, you won't receive a copy. It will cost you \$50 for a printed copy. Additional copies are also \$50 for each year.

