

JEFF PINKNEY CPA, INC.
CERTIFIED PUBLIC ACCOUNTANT

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TAX INFORMATION WORKSHEET - Tax Year _____

Taxpayer

Spouse

Name: _____
Social Security #: _____
Occupation: _____
Date of Birth: _____
Cell Phone: _____
Email: _____
Address: _____
City, State, Zip: _____

DEPENDENTS (List only children/dependents you are eligible to claim on your tax return)

1) Name: _____	2) Name: _____
Social Security # _____	Social Security #: _____
Date of Birth: _____	Date of Birth: _____
Relationship: _____	Relationship: _____
3) Name: _____	4) Name: _____
Social Security # _____	Social Security #: _____
Date of Birth: _____	Date of Birth: _____
Relationship: _____	Relationship: _____

If a refund is due, do you want it direct deposited? Yes () No ()

Financial Institution Name: _____

Routing #: _____

Account #: _____

Checking () Savings ()

If there is a balance due, do you want the payments? Yes () No ()
drafted from your account ?

(Amounts will be set to come out April 15th)