

Date

Referred By

George S. Magas, CPA
Client Information – 2022 tax returns



***** If a New Client – Please include your 2021 tax return. *****

Please fill this out – so that we can update our database

<u>Name</u>	<u>Social Security #</u>	<u>Birth Date</u>	<u>Occupation</u>	<u>Questions?</u>
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Taxpayer: _____	____-____-____	____/____/____	_____	<input type="checkbox"/>
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Spouse: _____	____-____-____	____/____/____	_____	<input type="checkbox"/>
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Address _____

Do you want your refund direct deposited? **Bank Name** _____, **Routing Number**

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Bank Account

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Taxpayer:

<input type="checkbox"/>	Home: _____
<input type="checkbox"/>	Cell: _____
<input type="checkbox"/>	Work: _____
<input type="checkbox"/>	Email: _____ @ _____

Spouse:

<input type="checkbox"/>	Home: _____
<input type="checkbox"/>	Cell: _____
<input type="checkbox"/>	Work: _____
<input type="checkbox"/>	Email: _____ @ _____

**** Please check above for the best way to reach you if we have questions.**

Dependents:

<u>Name</u>	<u>Social Security #</u>	<u>Birth Date</u>	<u>College Student (please check)?</u>
_____	____-____-____	____/____/____	<input type="checkbox"/>
_____	____-____-____	____/____/____	<input type="checkbox"/>
_____	____-____-____	____/____/____	<input type="checkbox"/>
_____	____-____-____	____/____/____	<input type="checkbox"/>