

Benton Tax and Accounting

New Client Intake Form

Please provide copy of last years return

We offer Virtual Services to save you another visit!

Do you request a paper copy of the tax return (instead of electronic)? (Circle) YES

*****Paper copies will have to be picked up in the office. Mailing is an option for a fee.

Do you have any crypto currency or foreign bank accounts?

Taxpayer (First, MI, Last)

SSN

Occupation

Date of Birth

Email

Address

City

State

Zip

Phone #

Alternate #

Spouse (First, MI, Last)

SSN

Occupation

Date of Birth

Email

Address

City

State

Zip

Phone #

Alternate #

Did you move residences in the past year?

When/Where?

Have you received any letters from any taxing agency in the past year?

Marital Status on 12/31/2022

Single

Married

Were you separated during the year?

Dependents (First, MI, Last)

SSN

Date of Birth

Months in home

Relationship

College Student?

<i>Dependents (First, MI, Last)</i>	SSN	Date of Birth	Months in home	Relationship	College Student?

Did any of the dependents have unearned income over \$1,100?

Do any dependents have disabilities?

Is it anticipated that a different taxpayer will seek to claim a person listed above as their dependent?

Direct Deposit Information

Name of Bank

Checking

Savings

Routing Number

Account Number