



personal touch tax & financial consultants

3207 emerald boulevard ♦ long pond, PA 18334 phone: 570.646.8102 fax: 570.643.5004

CLIENT INFORMATION SHEET

IF THERE ARE ANY QUESTIONS PLEASE FEEL FREE TO CALL US FOR ASSISTANCE.
REMEMBER TO ROUND TO THE NEAREST WHOLE DOLLAR.

TAXPAYER

FIRST _____ MIDDLE _____ LAST _____

DOB _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

SOCIAL SECURITY NUMBER _____

OCCUPATION _____

COUNTY OF RESIDENCE _____

COUNTY OF WORK _____

PHONE HOME _____ PHONE WORK _____

EMAIL _____

SPOUSE

FIRST _____ MIDDLE _____ LAST _____

DOB _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

SOCIAL SECURITY NUMBER _____

OCCUPATION _____

COUNTY OF RESIDENCE _____

COUNTY OF WORK _____

PHONE HOME _____ PHONE WORK _____

EMAIL _____

DEPENDENTS

FIRST _____ MIDDLE _____ LAST _____

RELATIONSHIP _____ DOB _____ SS NUMBER _____

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TAX PREP



TAX PLANNING



CONSULTING



RECORD KEEPING



PAYROLL



TRAINING



REPRESENTATION



SCAN & ARCHIVE