

Offsite Business Solutions, LLC

1874 Piedmont Rd NE Suite 470D, Atlanta, Georgia 30324

O: (404) 249-9949 F:(404) 885-9616

CLIENT INFORMATION FORM

(Please complete all information below that Apply)

TODAY'S DATE: _____

PLEASE INDICATE TAX YEAR: _____

AMENDED YEAR: _____

NEW CLIENT: _____

RETURNING CLIENTS: _____

✓ Check only one of the following:

☐ Single ☐ Married Filing Jointly * ☐ Head of the House ☐ Qualifying Widow

☐ Married Filing Separate*

Mr./Mrs./Ms./Miss (please circle one)

PRIMARY NAME: _____ SSN: _____ DOB: _____

SECONDARY NAME: _____ SSN: _____ DOB: _____

*(Please provide spouse information – If filing jointly or married filing separate)

ADDRESS: _____

CITY: _____ STATE: _____ ZIP CODE: _____

YOUR HOME #: _____ YOUR WK #: _____ YOUR CELL #: _____

SPOUSE HOME #: _____ SPOUSE WK #: _____ SPOUSE Cell #: _____

YOUR OCCUPATION: _____ SPOUSE OCCUPATION: _____

REFERRED BY: _____	EMAIL: _____
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DEPENDENTS NAME	D.O.B	SOCIAL SECURITY NUMBER	RELATIONSHIP

Please indicate your method of payment to Offsite Business Solutions below:

CASH: _____ VISA/DEBIT CARD: _____ CHECK: _____ FEE'S WITHHELD: N/A

Please indicate how you wish to receive your refund below:

CHECK By Mail: _____ BANK ACCOUNT: _____

PLEASE SUBMIT

PHOTO ID

BANK ACCOUNT INFORMATION

DRIVER LICENSE *BIRTH CERTIFICATE (children) SSN Card (children)

Note: This Information Must Be Accurate!

Revised 9-11-2012

PREPARATION CHECK LIST FOR TAX RETURN

LIST OF DOCUMENTS	✓ CHECK LIST COLUMN
Social Security Card(s)	
Driver's License(s)	
Dependents' Social Security Numbers & Dates of Birth	
Last Year's Federal and State Tax Returns	
Wage Statements - Form W-2	
Pension or Retirement Income - Form 1099-R	
Interest and Dividend Income - Form 1099-INT/Form 1099-DIV	
State Income Tax Refund Amount - Form 1099-G	
Social Security Income - Form SSA-1099	
Unemployment Income - Form 1099-G	
Commissions Received/Paid	
Information on sales of Stocks or Bonds - Form 1099-B	
Self-Employed Business/Farm Income & Expenses - Form 1099-MISC	
Merchant Card and Third Party Network Payments 1099-K	
Lottery or Gambling Winnings - Form W-2G	
Lottery or Gambling Losses	
Income and Expenses From Rentals	
Income from Partnerships, S Corporations, Trusts, and Estates - Schedule K-1	
IRA Contributions	
Alimony Paid or Received	
Child Care Expenses & Provider Information	
Medical, Eye Care, and Dental Expenses	
Cash and Non-cash Charitable Donations	
Record of Purchase or Sale of Residence	
Mortgage or Home Equity Loan Interest Paid - Form 1098	
Real Estate and Personal Property Taxes Paid	
State or Local Sales Taxes Paid	

Un-reimbursed Employment-Related Expenses	
Job-Related Educational Expenses	
Educator Expenses	
Tuition and Education Fees - Form 1098-T	
Student Loan Interest - Form 1098-E	
Casualty or Theft Losses	
Estimated Taxes	
Foreign Taxes Paid	

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