

AAA Tax Service of America



Today's Date: _____
Are you a previous client? ___ Yes ___ No
If not, how did you hear about us? _____
If you were referred, referred by: _____

Filing Status (Circle): Single Head of Household Married filing Joint Married filing Separate

Taxpayer Information:

Name: _____ Social Security Number (SSN): ____ - ____ - ____
Address: _____
City: _____ State: _____ Zip Code: _____
Cell Phone: _____ Work Phone: _____
Date of Birth (DOB): _____ Occupation: _____
E-mail Address: _____

Spouse Information(Include Even if Married Filing Separate):

Name: _____ SSN: ____ - ____ - ____
Cell Phone: _____ Work Phone: _____
Date of Birth (DOB): _____ Occupation: _____
E-mail Address: _____

Dependent Information:

1. Full Name: _____ DOB: _____ SSN: ____ - ____ - ____ Relation: _____
2. Full Name: _____ DOB: _____ SSN: ____ - ____ - ____ Relation: _____
3. Full Name: _____ DOB: _____ SSN: ____ - ____ - ____ Relation: _____
4. Full Name: _____ DOB: _____ SSN: ____ - ____ - ____ Relation: _____

Can anyone claim you as a dependent? ___ Yes ___ No

Did the taxpayer, spouse, or any dependents receive insurance through the Marketplace? ___ Yes ___ No

Anything Else We Should Know?

I certify that I would like my taxes prepared according to the information I supplied:

Taxpayer Signature(s): x _____

DROP OFF ONLY

Do you have state withholdings from any state besides SC? _____

Do you have any income other than W-2's? ___ Yes ___ No

Do you have rental property? ___ Yes ___ No

Are you self-employed? ___ Yes ___ No

Do you have income from?

___ W-2

___ Interest

___ Dividends

___ Stock Sales

___ Social Security

___ Retirement

___ Jury Duty

___ Other Miscellaneous Income

Dependent Questions

If you qualified for EIC on your 2018 tax return, was the EIC reduced or disallowed? ___ Yes ___ No

Can anyone else claim you or your dependent on his or her return? ___ Yes ___ No

Did your child live with you in the United States for over half of the year (all year if foster child)? ___ Yes ___ No

Out of anyone that can claim your child, do you have the higher income? ___ Yes ___ No

Does your or your spouse's Social Security Card allow you to work in this country? ___ Yes ___ No

Was your child's Social Security Card issued because they are a U.S. Citizen? ___ Yes ___ No

Is your child single? ___ Yes ___ No

Were you a non-resident alien for any part of the year? ___ Yes ___ No

Are the children you are claiming of blood relation? ___ Yes ___ No

How would you like to receive your refund?

Check
Free

Direct Deposit (DD)
Free

Bank Product Check
\$92

Bank Product DD
\$92

Bank Product Prepaid Card
\$92

Walmart Direct2Cash
\$99

For Preparer ONLY

Pending? ___ Yes ___ No, Ready to File.

If yes, reasoning: _____ (Missing Information, etc)

Explain: _____

Preparer Signature: x _____