



2011 CLIENT INFORMATION WORKSHEET

Please provide the following materials:

- ◆ Information worksheet on reverse side
- ◆ All wage and income statements (W-2s and 1099s)
- ◆ **NEW CLIENTS**: Include last year's federal and state income tax returns

A: PERSONAL DATA

| | |
|-----------------------------|-------------------------|
| Last Name: _____ | |
| First Name - Taxpayer _____ | Occupation: _____ |
| First Name - Spouse: _____ | Occupation: _____ |
| Address: _____ | Apt # : _____ |
| City: _____ | State: _____ Zip: _____ |
| Daytime Phone: _____ | Home Phone: _____ |
| e-mail: _____ * | |

B: EXEMPTIONS AND DEPENDENT DATA

| Name | Social Security Number | Son, Daughter, other dependent | Date of Birth |
|--------|------------------------|--------------------------------|---------------|
| Self | | ---- | |
| Spouse | | ---- | |
| | | | |
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