## JEFFERSON FINANCIAL SERVICES CLIENT INFORMATION WORKSHEET

TIME OF ARRIVAL: NEW CLI	ENT? YES / NO	APPOINTMENT TIME: WALK IN#		
FILING STATUS: SINGLE HEAD OF HOUSEHO		NT DMARRIED FILING SEPERATELY DWIDOW/ER		
TAXPAYER	SPO	OUSE		
		ME:D.O.B//		
NAME:D.O SSN://CDL	SSN	N:/CDL		
OCCUPATION:	001	CUPATION:		
OCCOLATION.		OUI ATION.		
STREET ADDRESS:	APT# CITY	STATE 7IP		
HOME PHONE: ( ) -	ALT PHONE:(	STATEZIP EMAIL:		
TIOMETTIONE.	ALT THORE:(	LIVIAIL.		
Dependent 1	Dependent 2	Dependent 3		
First Name:	First Name:			
TR A! -1 -11	Middle:	Middle:		
		Middle:		
Last Name:	Last Name:	Last Name:		
Relationship:	Relationship:	Relationship:		
D.O.B/	D.O.B. //	D.O.B		
SSN/	SSN//			
ChildCare Expenses: \$	ChildCare Expenses: \$			
Name of Provider:	Name of Provider:	Name of Provider:		
Address:	Address:	Address:		
City,State, Zip	City,State, Zip	City,State, Zip		
Tax Id# or SSN	Tax Id# or SSN			
Phone:	Phone:	Phone:		
IF ANTICIPATING A REFUND HOW WOULD YO	U LIKE TO FILE YOUR RETURN?			
Would you like Direct Deposit? Yes No	Bank Routing #	Acct#		
,	3			
□ RAL- Refund Anticipation Loan. If Approved	expect your refund in 24hours. Addit	ional Fees Required But are not paid Upfront.		
Troising / maiorpation 200m in / ipprovou	exposit your rotation in 2 moure. House	ional i coo i toquiloù bat alo not pala opnont.		
□ FEILE- Taxes are electronically sent to the IRS	S Expect your refund in 7-14 Days A	Additional Fee: \$25 If efiling Fed or State. \$40 for both.		
Li ille Taxes are electromically sent to the fixe	b. Expect your relation in 7-14 Days. F	dulitorial Fee. \$20 if chilling Fed of State. \$40 for both.		
□ Mail Return- You must mail your return to the	IRS and Franchise Tay Roard Ever	ect a Refund in approximately 8 weeks. No additional fees.		
i Maii Neturii- Tou must maii your return to the	EINS and Franchise Tax Board. Exp	ect a returna in approximately o weeks. No additional lees.		
Are your prepared to pay for your tayon today?	Van Na			
Are you prepared to pay for your taxes today?	res no			
Lautharina Jaffarran Firancial Comissas to Drawns	and Drange was Income toward All a			
i authorize Jeπerson Financial Services to Prepare	and Process my income taxes. All c	of the information provided is accurate to the best of my knowledge.		
	<b>-</b> .	D ( 1D		
Your Signature	Date	Referred By		
Office Use Only				
Intake Data Entry				

## JEFFERSON FINANCIAL SERVICES

This form is an inventory of documents that you have provided us with to prepare your tax return. You are responsible for providing us with all of the required documents needed to properly file your tax return. Your signature below certifies that these are the only forms that you have given to Jefferson Financial Services.

# of forms	Form name or Description of Form	Employer or Company Name	
	Form W-2 (Wage and Tax Statement)		
	Form 1099 Int (Interest Income)		
	,		
	Form 1099-Div (Dividend Income)		
	Form 1099-R (Pension & IRA Distribution)		
	Form 1099-Misc (NonEmp Comp/Rental/Royalty)		
	, , , , , , , , , , , , , , , , , , , ,		
	Form SSA 1099/Social Security Benefits		
	1 om cor recorded a county benefits		
	Form 1099-G (Unemployment/State Refund)		
	Tom root & (Grompleymont State Holand)		
	Form W-2G (Gambling Winnings)		
	Form 1098-E (Student Loan Interest)		
	Offit 1090-L (Student Loan Interest)		
	Form 1099-B (Brokering)		
	Form 1099-B (Brokering)		
	Form C (Calo of Deal Fatata)		
	Form-S (Sale of Real Estate)		
	Cahadula K (Dartharabin Ingama)		-
	Schedule K (Partnership Income)		
	Non Cook Charitable Contribution		
	Non-Cash Charitable Contribution		
	Due in order Tour Obata in out		_
	Property Tax Statement		
	Mortgage Interest Statement		
	VV 40 01 11 10 =		
	W-10 or ChildCare Expenses		
	Other Documents not Listed Above		
	Other Documents not Eisted Above	I	
<u>-</u>		•	
Taxpayer's	Signature		
Spouse's S	Signature		