

# R&R Tax New Client Information Sheet

Did you file with R&R last year?     Yes     No

<b>Primary Taxpayer Information</b>			<b>Current Occupation:</b>		
First Name	M.I.	Last Name	Date of Birth	Social Security #	
Home Address			City		State
Work Phone		Home Phone		Cell Phone	
Additional Contact Name			Relationship	Phone	

<b>Spouse's Information</b>			<b>Current Occupation:</b>		
First Name	M.I.	Last Name	Date of Birth	Social Security #	
Work Phone		Home Phone		Cell Phone	
Additional Contact Name			Relationship	Phone	

**Filing Status**     Single     Married Joint     Married Separate     Head of Household     Qualifying Widow

**Dependent Information** (Names **MUST** be listed as they appear on the Social Security Card)

Name	Date of Birth	Age	If 19 or Older	Social Security #	Relationship
			<input type="checkbox"/> Student <input type="checkbox"/> Disabled		
			<input type="checkbox"/> Student <input type="checkbox"/> Disabled		
			<input type="checkbox"/> Student <input type="checkbox"/> Disabled		
			<input type="checkbox"/> Student <input type="checkbox"/> Disabled		
			<input type="checkbox"/> Student <input type="checkbox"/> Disabled		
			<input type="checkbox"/> Student <input type="checkbox"/> Disabled		

**Daycare Information**

Provider Name	Address	Fed. ID #	Child's Name	Amount Paid

**Miscellaneous Information – Please Check Yes or No**

- Is anyone claiming you on their tax return?     Yes     No
- Did you file a 2006 tax return?     Yes     No
- Do you owe any delinquent student loans, child support, alimony, or taxes from prior tax years?     Yes     No
- Do you have any home mortgage interest?     Yes     No
- Are we preparing your Alabama State tax return?     Yes     No

If you have state returns to be filed other than Alabama, please list: \_\_\_\_\_

**I hereby certify that the information provided above is true and accurate to the best of my knowledge.**

Signature \_\_\_\_\_ Date \_\_\_\_\_