

Client Information Worksheet – All New Clients Must Complete

PRIMARY TAXPAYER – Please complete the following to update your profile or to begin filing taxes with H1 Tax Services Corp:

Taxpayer's Last Name _____ Taxpayer's First Name _____ Middle Initial _____

Social Security Number _____ Occupation, Position or Title _____ Date of Birth _____

PROOF OF ID:	
<input type="checkbox"/>	Driver License
<input type="checkbox"/>	State ID

US Citizen Green Card EAD/ H1/H4/L1/L2 OPT / F1 /J1 / M1 **Note Change in Status**

SPOUSE – Please tell us more about your Husband or Wife (if applicable)

Spouse's Last Name _____ Spouse's First Name _____ Middle Initial _____

Social Security Number / ITIN* _____ Occupation, Position or Title _____ Date of Birth _____

*You can apply for ITIN

PROOF OF ID:	
<input type="checkbox"/>	Driver License
<input type="checkbox"/>	State ID
<input type="checkbox"/>	Passport

US Citizen Green Card EAD/ H1/H4/L1/L2 OPT / F1 /J1 / M1 **Note Change in Status**

DEPENDENT 1 – Please tell us more about your Son, Daughter, Parent or Relative (if applicable)

Dependent's Last Name _____ Dependent's First Name _____ Middle Initial _____

Social Security Number / ITIN* _____ Occupation, Position or Title _____ Date of Birth _____

*You can apply for ITIN

PROOF OF ID:	
<input type="checkbox"/>	School/State ID
<input type="checkbox"/>	Report Card
<input type="checkbox"/>	Medical Record

US Citizen Green Card EAD/ H1/H4/L1/L2 OPT / F1 /J1 / M1 **Note Change in Status**

RELATIONSHIP: Son Daughter Parent Other Relative / Person

DEPENDENT 2 – Please tell us more about your Son, Daughter, Parent or Relative (if applicable)

Dependent's Last Name _____ Dependent's First Name _____ Middle Initial _____

Social Security Number / ITIN* _____ Occupation, Position or Title _____ Date of Birth _____

*You can apply for ITIN

PROOF OF ID:	
<input type="checkbox"/>	School/State ID
<input type="checkbox"/>	Report Card
<input type="checkbox"/>	Medical Record

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RELATIONSHIP: Son Daughter Parent Other Relative / Person

Next Steps:



THANK YOU FOR YOUR TIME & EFFORT!

If complete, you may visit our website to [UPLOAD](#) or [SUBMIT](#) this form with your tax docs.

Our office will contact you within 1 BUSINESS DAY to confirm a quote for fees, share info and next steps