



CLIENT INFORMATION SHEET

MARITAL STATUS: <input type="checkbox"/> SINGLE <input type="checkbox"/> MARRIED <input type="checkbox"/> MARRIED SEPARATED									
New clients, how did you hear about us?				Who referred you?					
TAXPAYER INFORMATION				SPOUSE INFORMATION					
Name (First, Initial, Last Name)				Name (First, Initial, Last Name)					
SSN		Date of Birth		SSN		Date of Birth			
Driver License/State ID #		State	ISS Date	Exp Date	Driver License/State ID#		State	ISS Date	Exp Date
Occupation				Occupation					
Cell Phone Receive Texts? <input type="checkbox"/> Yes <input type="checkbox"/> No				Cell Phone Receive Texts? <input type="checkbox"/> Yes <input type="checkbox"/> No					
E-Mail Address				E-Mail Address					
Mailing Address (street, apt #, city, state, zip)									
DO ANY OF THE FOLLOWING CIRCUMSTANCES/INCOME/EXPENSES APPLY? (check all that apply)									
<div><input type="checkbox"/> Being claimed as a dependent? <input type="checkbox"/> Are you or your spouse disabled? <input type="checkbox"/> Moved during the year? <input type="checkbox"/> Did you collect any tips? <input type="checkbox"/> Did you work any overtime? <input type="checkbox"/> LIVED or WORKED in the city? <input type="checkbox"/> Purchase a BRAND NEW car? <input type="checkbox"/> Wages - W2's _____ <input type="checkbox"/> Social Security Benefits <input type="checkbox"/> Self-Employment (Complete SE Form)</div>									

☐ Unemployment
☐ Pension & Annuities
☐ College Tuition
☐ Interest/Dividend Income
☐ Sale of Stocks
☐ Child Care Expenses
☐ Child Support \$ _____
☐ FIP/FIA/DHS Cash Benefits \$ _____
☐ VA Benefits? \$ _____
☐ 1095-A / Marketplace Insurance☐ Gambling Winnings
☐ Medical Expenses
☐ Student Loan Interest
☐ Mortgage Interest
☐ 1099-K (Personal or Business)
☐ Charitable Donations \$ _____
☐ Out of State Purchases
☐ Sale of Virtual Currency
☐ Worker's Compensation \$ _____
☐ Sale of Real Estate
☐ Injured Spouse

(Over)

RENT INFORMATION *(January 1st thru December 31st)*On Lease? ☐ Yes ☐ No Number of months you paid Rent _____ Monthly Rent you paid \$ _____Street Address *(Street, City, ST, Zip)*Landlord Name *(Street, City, ST, Zip)***RENT INFORMATION** *(January 1st thru December 31st)*On Lease? ☐ Yes ☐ No Number of months you paid Rent _____ Monthly Rent you paid \$ _____Street Address *(Street, City, ST, Zip)*Landlord Name *(Street, City, ST, Zip)***HEAT CREDIT INFORMATION**Heat included in rent or another's name? ☐ Included ☐ Not includedHeat Provider? ☐ BWL (901334)☐ Consumers (0900213)

Other _____

Type of heat? ☐ Electric (100)☐ Natural Gas (300)

Other _____

PROPERTY TAX/HOME OWNERSOwn a home you pay property taxes for? ☐ Yes ☐ No Did you provide physical copies of your property taxes? ☐ Yes ☐ No**IF NO**, what township did you live in so we can access them online?This home your primary residence? ☐ Yes ☐ No _____**PAYMENT OPTIONS**☐ Cash ☐ Check ☐ Credit Card☐ Deduct from Refund *(Additional Fees Apply)***REFUND OPTIONS**

*The Internal Revenue Service, working with the U.S. Department of the Treasury, announced that paper tax refund checks for individual taxpayers will be phased out beginning on Sept. 30, 2025, as required by Executive Order 14247, to the extent permitted by law. This marks the first step of the broader transition to electronic payments. IRS warns of a possible 6 week minimum delay. *Certain exceptions may apply to allow paper checks but still expect delays*

☐ Standard Mail* ☐ Direct Deposit☐ Refund Advance ☐ Card ☐ Check ☐ Direct Deposit

Routing # _____

Account # _____

Bank Name _____

☐ Checking ☐ Savings

By completing this form, you certify that you would like your taxes prepared according to the information provided above. All bank products are subject to Bank fees and approval by the bank. X-TAX cannot promise or guarantee refund advances as they are subject to Bank underwriting approvals. X-Tax is only a facilitator.

Signature: _____

Date: _____

COMMENTS/NOTES**\$\$****REFER-A-FRIEND****\$\$**You receive \$25 **CASH** for referring a **NEW CUSTOMER** to X-TAX!Your friend will receive a \$25 **DISCOUNT** off our tax fees!