

Date:	<u>Client Intake Tax Form</u> Heintz Tax Service	Tax Year: 2024 <input type="checkbox"/> New Client <input type="checkbox"/> Returning Client
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Thank you for allowing us to prepare your tax return. It is very important for you to provide the information on this form to help our staff in completing your return. If you have any questions, please ask.

Part 1: Your Information

Your Name	Date of Birth	SSN/ITIN	License info
			License # Issue Date: Exp. Date:
Spouse's Name	Date of Birth	SSN/ITIN	License info
			License # Issue Date: Exp. Date:

Best Phone #	Email

Mailing Address	School District/Township

Did you Move in 2024? <input type="checkbox"/> Yes <input type="checkbox"/> No	New Address:
Date of Move:	School District:

Filing Status: Single Married Married filing separate Head of household
 Qualifying widow(er) w/ dependent child **Student Return**

Part 2: Dependent Information

Are there any changes to your Dependents? Yes No **If Yes, which Dependent:**
Remove Dependent: Yes No **Reason for Change:**

Name (first, last)	DOB	Social Security #	Relationship to you	Full-time Student YES/NO	Daycare Expenses YES/NO

Part 3: Bank Information **SAME as Previous Year**

Bank Name	9-Digit Routing #	Bank Account #	Account Type
			<input type="checkbox"/> Checking <input type="checkbox"/> Savings

Part 4: NOTES