

# 2020 Federal Information Worksheet

## Part I – Personal Information

Taxpayer
Last Name:
First Name:
Middle Initial:
Social Security Number:
Occupation:
Date of Birth:
Email Address:
Work Phone:
Cell Phone:
Home Phone:

Spouse
Last Name (if different):
First Name:
Middle Initial:
Social Security Number:
Occupation:
Date of Birth:
Email Address:
Work Phone:
Cell Phone:
Home Phone:

Address
Street:
Apt/Unit/Suite:
City, State & ZIP Code:

## Part II – Federal Filing Status (Choose One)

- Single
- Married Filing Jointly
- Married Filing Separately
- Head of Household
- Qualifying Widow(er)

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## Part III – Dependent Information

First Last & MI	SSN	DOB	Relationship	# of months lived w/ taxpayer

## Part IV – Stimulus Information

Amount Received in First Stimulus Package: \_\_\_\_\_

Amount Received in Second Stimulus Package: \_\_\_\_\_

## Part V – Banking Information

Would you like a direct deposit of refund or electronic withdrawal of taxes owed?  YES  NO

★If you answered YES, please provide the following information:

Bank Name: \_\_\_\_\_

Routing Number: \_\_\_\_\_

Account Number: \_\_\_\_\_

Checking

Savings

## Part VI – Payment Type for Services Rendered (Check One)

Check

Cash

Credit Card

From Refund (\$94.90  
Bank Fee ONLY - Tax  
Prep Fee Additional)