

# *Richard Sherrin and Associates Client Intake Form*

1. Your Name \_\_\_\_\_

2. Spouse's Name \_\_\_\_\_

3. Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP code \_\_\_\_\_

Phone Number \_\_\_\_\_ Email \_\_\_\_\_

Did you move in 2023?  Yes  No      Do you need to pay a city tax?  Yes  No

4. Direct deposit information for refunds if you are due one      Routing number \_\_\_\_\_  
 Account number \_\_\_\_\_  
 Bank Name \_\_\_\_\_

5. Your Date of Birth \_\_\_\_\_ 6. Your Job Title \_\_\_\_\_

7. Spouse's Date of Birth \_\_\_\_\_ 8. Your Job Title \_\_\_\_\_

9. As of Dec 31, 2023 what was your marital status       Never Married  
 Married      Did you get married in 2023  Yes  No  
 Divorced      Date of Final decree \_\_\_\_\_  
 Legally Separated      Date of seprate maintenance decree \_\_\_\_\_  
 Widowed      Date of spouse's death \_\_\_\_\_

10. Did you make any estimated payments for this tax year? If so list them below

	Q1	Q2	Q3	Q4
Federal				
State				

11. List the dependants you are claiming. If any do not live with you please indicate that.

*Do not include yourself or spouse*

	Name (First and last)	Date of Birth	SSN	Relationship	Student?
1					
2					
3					
4					

*\*If you have more than 4 dependents please include the others information*

12. If you pay for post tax health insurance and live in ohio please include the amount \_\_\_\_\_

13. If you have any business or rental property please have all items totaled and organized. Failure to do so will delay your tax return

14. Did you make any energy efficient improvements to your house (roof, door, window, isulation etc.)

*\*Please be sure to include a copy of any taxpaper's driver's license.*