



**2026 Tax Client Contact Information Form**

(Please Print)

rev. 7 Jan 2026 for Tax Year 2025]

**Taxpayer Name:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_ **E-Mail:** \_\_\_\_\_

**SSN:** \_\_\_\_\_ **DOB:** \_\_\_\_\_ **Occupation:** \_\_\_\_\_

**Spouse Name:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_ **E-Mail:** \_\_\_\_\_

**SSN:** \_\_\_\_\_ **DOB:** \_\_\_\_\_ **Occupation:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Dependent Information:** (only list dependents to be claimed on your Tax Return)

1. Name \_\_\_\_\_ DOB: \_\_\_\_\_

Relationship Son  Daughter  or Other:  \_\_\_\_\_

SSN \_\_\_\_\_

2. Name \_\_\_\_\_ DOB: \_\_\_\_\_

Relationship Son  Daughter  or Other:  \_\_\_\_\_

SSN \_\_\_\_\_

3. Name \_\_\_\_\_ DOB: \_\_\_\_\_

Relationship Son  Daughter  or Other:  \_\_\_\_\_

SSN \_\_\_\_\_

**By default we will use the taxpayer contact information for all communications unless informed otherwise**