

# GENESIS TAX SERVICE LLC

## GENERAL INFORMATION SHEET

PLEASE PROVIDE TWO (2) FORMS OF ID: DRIVER'S LICENSE, SOCIAL SECURITY CARD,  
WORK OR SCHOOL ID  
PLEASE PRINT

TODAY'S DATE \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_

DO YOU OWE IRS, CHILD SUPPORT ARREARS OR A DEFAULTED STUDENT LOAN? Y\_\_\_ N\_\_\_

ARE YOU A REPEAT CLIENT? Y\_\_\_ N\_\_\_

### PRIMARY TAXPAYER INFO:

First Name: \_\_\_\_\_

Last Name: \_\_\_\_\_

SSN: \_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_

Date of Birth: \_\_\_\_\_

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

City/State/Zip Code: \_\_\_\_\_

County: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_

Evening Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Occupation: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

### SPOUSE INFORMATION:

First Name: \_\_\_\_\_

Last Name: \_\_\_\_\_

SSN: \_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_

Date of Birth: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_

Evening Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Occupation: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

### FILING STATUS (SELECTION ONE)

Single \_\_\_\_\_ Head of Household \_\_\_\_\_ Married Filing Jointly \_\_\_\_\_

Married Filing Separately \_\_\_\_\_ Qualifying Widow/Widower \_\_\_\_\_

**OVER**

**DEPENDENT INFORMATION**

List names **EXACTLY** as they appear on Social Security Card

Name	Date of Birth	Social Security No.	Relationship to You

**CHILDCARE INFORMATION**

Provider's Name: \_\_\_\_\_

Provider's Address: \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

SSN or Tax ID No.: \_\_\_\_\_

Amount Paid: Per Week \_\_\_\_\_ Per 2 Weeks \_\_\_\_\_ Per Month \_\_\_\_\_

**PLEASE READ, SIGN AND DATE:**

I ATTEST THAT ALL INFORMATION PROVIDED BY ME FOR THE PREPARATION OF MY INCOME TAX RETURN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE, INFORMATION AND BELIEF. I ALSO AGREE THAT IN THE EVENT MY REFUND IS INTERCEPTED, I WILL REMIT PAYMENT FOR TAX PREPARATION FEES TO GENESIS TAX SERVICE.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Preparer's Signature

\_\_\_\_\_  
Date

**FOR DIRECT DEPOSIT:**

**RTN NO.:** \_\_\_\_\_

**ACCOUNT NO:** \_\_\_\_\_