

New Clients Only

LB Tax Services, LLC New Client Worksheet

This worksheet is provided to assist us in preparing your Income Tax Returns.

Please provide your last
**two years Income Tax
Returns for a courtesy review
and carry-forward information.**

Drivers Licenses are required.

Social Security cards are required.

How did you hear about LB Tax Services?

- Current Client. Who? _____
- Yellow Pages / Desert Lightning News
- Internet / BBB
- Other _____

Taxpayer

Name: _____
SSN: _____
Occupation: _____
Date of Birth: _____
E-mail Address: _____
Work Phone _____
Cell Phone _____
Home Phone _____
Mailing Address: _____
City, State, Zip: _____

Spouse

Name: _____
SSN: _____
Occupation: _____
Date of Birth: _____
E-mail Address: _____
Work Phone _____
Cell Phone _____

Dependents

NOTE: You must provide a Social Security Card for all dependents.

Name	Social Security #	Relationship	Birth Date	Months In Home in 2016?
1)				1-2-3-4-5-6-7-8-9-10-11-12
2)				1-2-3-4-5-6-7-8-9-10-11-12
3)				1-2-3-4-5-6-7-8-9-10-11-12
4)				1-2-3-4-5-6-7-8-9-10-11-12

Please review the list of Forms at www.LBTaxServices.com for other forms as they pertain to tax returns.

Direct Deposit Refunds / Automatic Withdrawal of Amounts Due?