Hurst, Kelly and Company LLC Form 1040 New Client Basic Information Worksheet (in Lieu of Completed Tax Organizer)

Taxpayer Information	Spouse Information
Last Name:	Last Name:
First Name:	First Name:
Middle Initial:	Middle Initial:
Taxpayer DOB:	Spouse DOB:
Taxpayer SS#:	Spouse SS#:
Occupation:	Occupation:
Taxpayer Cell: ()	Spouse Cell: ()
Taxpayer Email:	Spouse Email:
Address:	Apt Number:
City:	State: Zip Code:
Directly Deposit Refunds? Yes	No
Account Routing Number:	Account #:
Do You Live Within City Limits? Yes N	o City:
Driver's License/State Issued ID	
Taxpayer	Spouse
Issuing State:	
License Number:	
Date Issued:	
Expiration Date:	
Dependent Information	
<u>First Name Last Name MI</u> SS#	Child Care DOB Relationship Expense Tuition Expense