

NEW CLIENT DROP OFF SHEET

IF YOU ARE A NEW CLIENT DROPPING OFF OR EMAILING YOUR TAX INFORMATION FOR MARKO TAX & FINANCIAL SERVICE LLC, PLEASE FILL OUT THE FOLLOWING:

1. NAME(S): TAXPAYER _____ SPOUSE _____

2. FILING STATUS: _____

3. SS#: TAXPAYER _____ SPOUSE _____

4. BIRTHDATES: TAXPAYER _____ SPOUSE _____

5. ADDRESS TO USE ON RETURN: _____

IF MOVED: OLD ADDRESS AND WHEN _____

6. OCCUPATIONS: TAXPAYER _____ SPOUSE _____

7. PHONE NUMBERS: (CELL) _____ (HOME) _____

8. EMAIL: TAXPAYER _____ SPOUSE _____

9. ANY DEPENDENTS: YES _____ NO _____

IF YES:	NAME(S)	DOB	SS#	RELATIONSHIP
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10. DRIVERS LICENSE INFORMATION: ID#, ISSUE DATE AND EXPIRATION DATE

TAXPAYER: _____

SPOUSE: _____

11. BANK INFO FOR DIRECT DEPOSIT (INCLUDE A VOIDED CHECK)

NAME OF BANK _____

ROUTING NUMBER _____

ACCOUNT NUMBER _____

12. TOTAL STIMULUS MONEY RECEIVED IN 2020: _____