

Individual Client Registration

Taxpayer's Information:

First Name: _____ Last Name: _____ Middle Initial: _____

Date of Birth: _____ Cell Phone: _____

Email: _____ Occupation: _____

Spouse's Information:

First Name: _____ Last Name: _____ Middle Initial: _____

Date of Birth: _____ Cell Phone: _____

Email: _____ Occupation: _____

Current Street Address:

City: _____ State: _____ Zip Code/Postal: _____

Dependents' Claimed on Return Information

(1) Name: _____

Date of Birth: _____ Grade in School: _____

School/Daycare: _____

(2) Name: _____

Date of Birth: _____ Grade in School: _____

School/Daycare: _____

(3) Name: _____

Date of Birth: _____ Grade in School: _____

School/Daycare: _____

708 Rosa Avenue
Metairie, LA 70005
504-832-1873
Office fax: 504-832-1858
Efax: 866-903-0905
jheathcpa.com

Filing Information

What was your filing status on last year's tax return?

- ☐ Single
☐ Married Filing Jointly
☐ Married Filing Separately
☐ Qualifying Widow(er) with Minor Child
Year Spouse Died: _____

- ☐ Head of Household
Non- Dependent Name & SSN:

_____-_____-____

Will that change for this year's tax return? If yes, please state the new status: _____

Did you make any quarterly estimated tax payments to the IRS towards this year's taxes? If so, explain.

If you are due a refund, how do you want to receive it?

- ☐ Apply to next year's estimates
☐ Direct deposit
(please provide voided blank check)
☐ Checking
☐ Savings

If you owe taxes how do you want to pay them?

- ☐ Pay online personally by credit card or ACH
☐ Direct debit with my efiled return from my bank account
(please provide voided blank check)
☐ Checking
☐ Savings

Basic Questions

	Yes	No
a. Do you have a mortgage?	☐	☐
b. Do you own rental property?	☐	☐
c. Did you receive pension benefits?	☐	☐
d. Did you receive Social Security benefits?	☐	☐
e. Did you sell stocks or bonds?	☐	☐
f. Did you receive interest or dividends?	☐	☐
g. Have you been contacted by the IRS and/or your state regarding the prior year's tax return?	☐	☐

Did anyone refer you to J. Heath & Co.? If so, please write their name so that we may thank them.

Please attach a copy of the prior year's tax return.