M Tax Advisors
Mary Johnson, EA
115 W Idaho St
Weiser, ID 83672

M Tax Advisors

Basic Data

Date:

Marital Status: ☐ Married ☐ Single ☐ Separated ☐ Divorced ☐ Widowed

As of:

Client Information

Name: **Sex:** **DOB:**

Birthplace: **Social Security#:** **DL #** **Exp:**

Phone: **Cell Phone:** **Email:**

Home Address: **City, State, Zip:**

Spouse Information

Name: **Sex:** **DOB:**

Birthplace: **Social Security#:** **DL #** **Exp:**

Phone: **Cell Phone:** **Email:**

Home Address: **City, State, Zip:**

Business Information: ☐ Owner ☐ Employee

Business Name: **Title** **Annual Salary:**

Industry **Business Phone:** **Business Fax:**

Business Address: **City, State, Zip:**

Spouse Business Information: ☐ Owner ☐ Employee

Business Name: **Title** **Annual Salary:**

Industry **Business Phone:** **Business Fax:**

Business Address: **City, State, Zip:**

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Dependent Information

First	*Middle*	*Last*	*Social Security #*	*DOB*	*Sex*	*Relationship*

Hobbies

Favorites (Optional)

Beverage

Candy

Snack

Movie

Book

Character

Vacation Spot

Sports Team

Thing to do to Relax

Animal

Collectible

Retailer

Other