

Premier Financial Tax & Accounting Services dba Friendly Tax Services

Taxpayer Data Sheet

Name: _____ Tax Year: _____

Occupation: _____

Filing Status	Yes/No
Single	
Married Filing Jointly	
Married Filing Separately	
Head of Household	
Widower	
Citizenship	
If not US, Canada, Mexico, - Resident Alien	
Number of Dependents	

Address: _____ City _____ State _____

Zip Code: _____ Telephone Number: _____

SSN: _____

Date of Birth: _____

Driver License #: _____

Issued Date: _____ Expired Date _____

Email: _____

Client's Signature: _____

Date: _____

Preparer/Office Personnel: _____

Taxpayer attest that the information provided are TRUE and are to be use for the sole purpose of filing his/her Income Tax Return. Tax Preparer is required keep a copy of documents provided for up to three years and to safeguard taxpayer information in a secure location. The information is to be use for sole purpose of filing tax return.

Documents Present	Yes/No - How Many
W-2	
Form 1099-NEC/Form 1099-Misc/1099-K	
Business Information	