

# Mark Schwanbeck Tax Preparation

**Mark Schwanbeck, EA**

*Enrolled Agent admitted to practice before the IRS*

## New Taxpayer Information

	Taxpayer		Spouse	
Last Name				
First Name				
Middle Initial and Suffix	MI:	Suffix:	MI:	Suffix:
Social Security Number				
Occupation				
Cell Phone				
Work Phone				
Home Phone				
E-Mail Address				
Date of Birth (MM/DD/YYYY)				
Driver's License Number & State				
Driver's License Issue & Expiration Dates				
Street Address			APT#	
City				
State			Zip Code:	

## Dependent Information

Last Name	MI	Social Security Number	Date of Birth MM/DD/YYYY	Months Lived with Taxpayer	Child Care Expenses
First Name	Suffix	Relationship to Taxpayer			

# Tax Return Refund Direct Deposit Information

## Bank Account Information

Name of Financial Institution: \_\_\_\_\_

Routing Number: \_\_\_\_\_

Account Number: \_\_\_\_\_

Checking

Savings

**TIP** Call your financial institution to make sure they will accept direct deposits.

**TIP** Verify your account number and routing transit number with your financial institution

**TIP** Do not use a deposit slip to verify the routing number.

Routing Transit Number

Account Number

JOHN PUBLIC 123 Main Street Your Town, FL 12345	19	1234
PAY TO THE ORDER OF _____	\$	
Your Town Bank Your Town, FL 12345		DOLLARS
For _____		
⑆250000005⑆ 1234556789022⑆		

NOTE: THE ACCOUNT AND ROUTING NUMBER MAY APPEAR IN DIFFERENT PLACES ON YOUR CHECK.