



PERSONAL INFORMATION

PRIMARY TAXPAYER –

TAX YEAR: _____

FULL NAME: _____

SOCIAL SECURITY NUMBER: _____ DATE OF BIRTH: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP CODE: _____

DAYTIME PHONE: _____ CELL PHONE: _____

OCCUPATION: _____ EMAIL: _____

SPOUSE –

FULL NAME: _____

SOCIAL SECURITY NUMBER: _____ DATE OF BIRTH: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP CODE: _____

DAYTIME PHONE: _____ CELL PHONE: _____

OCCUPATION: _____ EMAIL: _____

****DID YOU RECEIVE UNEMPLOYMENT?**

Taxpayer: Yes [] No [] Spouse: Yes [] No []

FILING STATUS?

Single [] Married-Joint [] Married-Separate [] Head of Household [] Widowed []

*If spouse died, enter date of death: _____

- | | | |
|--|--------------------------|------------------------|
| 1. Are you disabled? | Taxpayer: Yes [] No [] | Spouse: Yes [] No [] |
| 2. Are you a full-time student? | Taxpayer: Yes [] No [] | Spouse: Yes [] No [] |
| 3. Do you currently owe the IRS for previous years? | Taxpayer: Yes [] No [] | Spouse: Yes [] No [] |
| 4. Do you currently owe back State taxes? | Taxpayer: Yes [] No [] | Spouse: Yes [] No [] |
| 5. Do you currently owe back child support? | Taxpayer: Yes [] No [] | Spouse: Yes [] No [] |
| 6. Do you currently owe Student Loans? | Taxpayer: Yes [] No [] | Spouse: Yes [] No [] |
| 7. Did you have Gambling Winnings? | Taxpayer: Yes [] No [] | Spouse: Yes [] No [] |
| 8. Do you want \$3 to go to the Presidential Election Campaign Fund? | Taxpayer: Yes [] No [] | Spouse: Yes [] No [] |

DO YOU: Own home [] Rent [] Other []

FOR RENTERS ONLY –

Name of Landlord: _____

Landlords Address: _____

Rental Address: _____

Months Rented: _____

Monthly Rent: \$ _____

****Are you applying for a Refund Advance Loan (AS AVAILABLE) Yes [] No []**

DIRECT DEPOSIT INFORMATION

Name of Bank: _____

Routing Number: _____

Account Number: _____

