

JK Associates New Client Information Sheet

Dear Clients, the IRS asks us to know our clients. The information on this form will not be shared and be used only for preparing your tax return. Our Privacy Policy applies.

Name (as it appears on Social Security Card):	SSN:	Date of Birth:
Drivers's License #		State:
<input type="checkbox"/> Married <input type="checkbox"/> Divorced (year _____) <input type="checkbox"/> separated <input type="checkbox"/> not married		<input type="checkbox"/> US Citizen

Name (as it appears on Social Security Card):	SSN:	Date of Birth:
Drivers's License #		State:
<input type="checkbox"/> Married <input type="checkbox"/> Divorced (year _____) <input type="checkbox"/> separated <input type="checkbox"/> not married		<input type="checkbox"/> US Citizen

Dependent's Name (as it appears on SSA Card):	SSN:	Date of Birth:
<input type="checkbox"/> lived with you all year <input type="checkbox"/> disabled		<input type="checkbox"/> US Citizen

Dependent's Name (as it appears on SSA Card):	SSN:	Date of Birth:
<input type="checkbox"/> lived with you all year <input type="checkbox"/> disabled		<input type="checkbox"/> US Citizen

Dependent's Name (as it appears on SSA Card):	SSN:	Date of Birth:
<input type="checkbox"/> lived with you all year <input type="checkbox"/> disabled		<input type="checkbox"/> US Citizen

Does anyone else live in the household with you? yes no

Have you ever had any issues with the IRS, such as late filings, IRS letters, or OIC?

yes no