

**Client Information Worksheet**  
**MASH Accounting & Consulting LLP**  
**1110 N. Brand Blvd Suite 304, Glendale, CA 91202**

**PERSONAL INFORMATION**

Name(s)  
And  
Address:

**Filing Status:**

- |                          |                            |
|--------------------------|----------------------------|
| <input type="checkbox"/> | Single                     |
| <input type="checkbox"/> | Married, Filing Jointly    |
| <input type="checkbox"/> | Married, Filing Separately |
| <input type="checkbox"/> | Head of Household          |
| <input type="checkbox"/> | Widow(er)                  |

<b>Filer's Date of Birth</b>	<b>Spouse's Date of Birth</b>	<b>Filer's SSN:</b>	<b>Spouse's SSN:</b>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<b>Filer's Occupation</b>	<b>Spouse's Occupation</b>	<b>Contact Number:</b>	<b>Email Address:</b>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

**DEPENDENTS** – Please list all dependents, regardless of age, that did not provide more than ½ of their own support. Do not list spouse.

Name of Dependents & Relationship	Date of Birth	Social Security #	Months in your home in 2012	Full Time Student 5 months or more?

**Prior Year Tax Returns** – If available, please provide a copy of your previous 3 years of tax returns.  
**Income Documents** - Please provide all W-2 Forms and Form 1099s received for the current tax year.

**Banking Information** - Complete only if you prefer direct deposit

- Use this bank account info for current year direct deposit, if applicable.  
 Use this bank account info for current year debit, if applicable.

Type of account  Checking  Savings Name of Financial Institution \_\_\_\_\_  
Routing Number \_\_\_\_\_ Account Number \_\_\_\_\_

**How did you hear about us?**

- Facebook  Flyer  Instagram  Internet Search  LinkedIN  Radio  Television  Twitter  
 Referral (please specify whom) \_\_\_\_\_  Yelp  
 Other (please specify) \_\_\_\_\_

**Tax Return – How would you like your tax return?** Select all that apply.

- Email  Paper Copy  CD

All emailed tax returns will be password encrypted with the last 4 digits of the Filer's SSN.

**Other Comments**