



MAIN INFO SHEET

Tax Year: _____

Date of drop-off: _____

Office Location:

Plainfield, NJ

Cumming, GA

North Plainfield, NJ

TX Office

W2's		1095's	
1099-MISC		1098's	
1099G Unemployment		Monthly Rent	

Marital Status:

S MFJ MFS HOH Q/W

Primary Tax Payer

Full Name _____

Social Security # / ITIN _____

Date of Birth _____

Street Address _____

City _____

State _____

ZIP _____

Email _____

Is anyone claiming you as a dependent?

Phone _____

Yes No

Your Spouse

Full Name _____

Social Security # / ITIN _____

Date of Birth _____

Street Address _____

City _____

State _____

ZIP _____

Email _____

Is anyone claiming you as a dependent?

Phone _____

Yes No

Dependents

①	_____	_____	_____	_____	Full-Time Student?	Day-Care?
	Full Name	Date of Birth	Social Security # / ITIN	Relationship	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
②	_____	_____	_____	_____	Full-Time Student?	Day-Care?
	Full Name	Date of Birth	Social Security # / ITIN	Relationship	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
③	_____	_____	_____	_____	Full-Time Student?	Day-Care?
	Full Name	Date of Birth	Social Security # / ITIN	Relationship	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
④	_____	_____	_____	_____	Full-Time Student?	Day-Care?
	Full Name	Date of Birth	Social Security # / ITIN	Relationship	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Direct Deposit Info

Bank Name: _____

Initials: _____

Account # _____

Routing # _____

MUST BE SIGNED IN FRONT OF THE PREPARER

PREPARER'S NAME

DISCLOSURE

THE UNDERSIGNED TAXPAYER & SPOUSE (IF APPLICABLE) HAVE PROVIDED ALL THE INFORMATION LISTED. IN ORDER FOR MY (OUR) TAX RETURN TO BE PREPARED BY LA FERIA SERVICES, LLC AND THEIR STAFF UNDER PENALTIES OF PERJURY. I (WE) DECLARE THAT THE AMOUNTS USED WERE PROVIDED BY ME (US) AS SHOWN ON ANY FORMS OR ACCOMPANYING SCHEDULES. I FURTHER UNDERSTAND THAT IT IS MY (OUR) DUTY TO RETAIN COPIES OF ALL DOCUMENTS USED TO ASSIST IN PREPARING MY (OUR) TAX RETURN FOR FUTURE AUDITS. I (WE) UNDERSTAND THAT IF I (WE) MISPLACE OUR TAX RETURN, LA FERIA SERVICES, LLC MAY CHARGE A FEE FOR ANY ADDITIONAL COPIES. IN ADDITION, IF I (WE) FORGET ANY DOCUMENTS (W2, 1099NEC, ETC;) AND MY TAX MUST BE ADJUSTED, LA FERIA SERVICES, LLC MAY CHARGE AN ADDITIONAL FEE. I FURTHER AUTHORIZE LA FERIA SERVICES, LLC TO INFORM ME (US) OF ANY DISCOUNTS, PROMOTIONS OR INFORMATION I MAY NEED VIA EMAIL OR BY PHONE. WE ARE PLEASED TO HAVE YOU AS A CLIENT AND LOOK FORWARD TO A LONG AND MUTUALLY SATISFYING RELATIONSHIP.

REVELACIÓN

EL CONTRIBUYENTE ABAJO FIRMANTE Y EL CÓNYUGE (SI APLICA) HAN PROPORCIONADO TODA LA INFORMACIÓN INDICADA. PARA QUE MI (NUESTRA) DECLARACIÓN DE IMPUESTOS SEA PREPARADA POR LA FERIA SERVICES, LLC Y SU PERSONAL BAJO PENALIDADES DE PERJURIO. DECLARAMOS (NOSOTROS) QUE LAS CANTIDADES UTILIZADAS FUERON PROPORCIONADAS POR MÍ (NOSOTROS) COMO SE MUESTRA EN CUALQUIER FORMULARIO O HORARIO ADJUNTO. ENTIENDO ADEMÁS QUE ES MI (NUESTRO) DEBER DE GUARDAR COPIAS DE TODOS LOS DOCUMENTOS UTILIZADOS PARA AYUDAR EN LA PREPARACIÓN DE MI (NUESTRA) DECLARACIÓN DE IMPUESTOS PARA FUTURAS AUDITORÍAS. YO (NOSOTROS) ENTIENDO QUE SI YO (NOSOTROS) PERDEMOS NUESTRA DECLARACIÓN DE IMPUESTOS, LA FERIA SERVICES, LLC PUEDE COBRAR UNA TARIFA POR CUALQUIER COPIAS ADICIONALES. ADEMÁS, SI OLVIDÓ (NOSOTROS) CUALQUIER DOCUMENTO (W2, 1099 NEC, ETC;) Y MI IMPUESTO DEBE SER AJUSTADO, LA FERIA SERVICES, LLC PUEDE COBRAR UNA TARIFA ADICIONAL. ADEMÁS AUTORIZO A LA FERIA SERVICES, LLC PARA INFORMARME (NOSOTROS) DE CUALQUIER DESCUENTO, PROMOCIÓN O INFORMACIÓN QUE PUEDA NECESITAR POR CORREO ELECTRÓNICO O POR TELÉFONO. NOS COMPLACE TENERLE COMO CLIENTE Y ESPERAMOS UNA RELACIÓN LARGA Y MUTUAMENTE SATISFACTORIA.

Date

Taxpayer Signature

Spouse's Signature (if applicable)