

# Tax Advisory Group

OF JACKSONVILLE, INC.

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## Client Information

Name		Spouse	
DOB		DOB	
SSN		SSN	
Email		Email	
Phone		Phone	
Street Address		City, state, Zip	

## Dependents:

Name	DOB	SSN

## Do you:

- Own your home?
- Have rental properties?
- Have investment income?
- Own a business or are you self-employed? \*

## Banking Information:

Bank name \_\_\_\_\_  
Routing \_\_\_\_\_ Account \_\_\_\_\_

\*Business Name: \_\_\_\_\_  
EIN \_\_\_\_\_ Start Date \_\_\_\_\_

*Handling Your Tax Needs from Start to Finish*