



# LFG Tax Services, Ltd.

Date Received: \_\_\_\_\_ Received by: \_\_\_\_\_

Client Name: \_\_\_\_\_ Client ID: \_\_\_\_\_

New Client?: Yes No Referred By: \_\_\_\_\_

Client Phone: ( \_\_\_\_ ) \_\_\_\_ - \_\_\_\_\_ Email: \_\_\_\_\_

Taxpayer Ohio Driver's Lic # \_\_\_\_\_ Issue Date: \_\_\_\_\_ Expires: \_\_\_\_\_

Spouse Ohio Driver's Lic # \_\_\_\_\_ Issue Date: \_\_\_\_\_ Expires: \_\_\_\_\_

File my returns electronically: Yes No

When returns are completed: Pick Up Mail Client Portal Deliver

Client Copy preferred: Paper Client Portal

Requested date for special circumstance: \_\_\_\_\_

Does client want tax due withdrawn from bank account? Yes No

Does client want refund direct deposited to bank account? Yes No

If yes to either question: Bank Name: \_\_\_\_\_

Routing #: \_\_\_\_\_ Account #: \_\_\_\_\_

To the best of your knowledge, is all information needed to prepare your tax returns accurately Included?

Yes No

If No, what is missing? \_\_\_\_\_

Is there anything that changed during the past year that would impact your tax return?

(sale of home, retirement, new job, changes in dependents) Yes No

If yes, please detail: \_\_\_\_\_

Did you receive the Economic Impact Payment (Stimulus Check \$1400)? Yes No

Amount Received: \$ \_\_\_\_\_

Did you receive Advanced Child Tax Credit Payments? Yes No

Amount Received: \$ \_\_\_\_\_