

KEMBEL TAX SERVICE

How did you hear about us? K92, STAR 949, Q99, WROV/JOHNBOY/BILLY, GREG ROBERTS
 WDBJ7, WSLS10, FOX2127 ONLINE or REFERRED BY _____

Please provide us with valid ID's for Taxpayer/Spouse and dependents who wish to file a return.

TAXPAYER'S INFO
Full Name: <small>(as it appears on SS card)</small>
Social Security No:
Birthdate:
Occupation:
Home Phone No:
Cell Phone No:
Email:
Address:
City: State: Zip:
Nickname (if any) _____

SPOUSE'S INFO
Full Name: <small>(as it appears on SS card)</small>
Social Security No:
Birthdate:
Occupation:
Cell Phone No:
Email:
Nickname (if any) _____

In which city/county do you reside?	(please circle city or county)
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DEPENDENT INFORMATION			
Name: <small>(as appears on SS card)</small>	Social Security No:	Relationship:	Date of Birth

Did you receive the \$7500 First Time Homebuyer Credit in 2008/2009?	YES OR NO
Did you refinance your primary home during 2018?	YES OR NO
If you received your healthcare at any time during 2018 through the ACA/Marketplace/Obamacare, we will need a 1095A.	

At any time during 2018, did you or your spouse have signature authority over any foreign bank /investment accounts totaling \$10,000 or more? If yes, you will need to prepare an FBAR through FINCEN. These accounts might be family owned, but you are able to sign. This would also include Gambling & Fantasy Sports accounts. Please provide us with details concerning this, including Name, address, and account numbers of the financial institution.

If you'd like to receive your refund via direct deposit, please provide us with the name, routing and account number of the account you'd like to use:

Bank Name _____ Routing # _____ Account # _____

In lieu of this, a voided check will suffice.

Per the IRS, refunds take approximately 21 days if using direct deposit. If receiving a check in the mail, they generally take 4-5 weeks to arrive.

Please review our accompanying Income/Deduction checklist for any items that may pertain to the preparation of your return.

All information given to Kembel Tax Service on this form and other information given pertaining to the preparation of this income tax return is true to the best of my knowledge. The responsibility for proof of reported income and any other expenses is mine.

If filing a joint return, each spouse authorizes Kembel Tax Service, Inc. to share information with each other.

TAXPAYER (SIGNATURE) _____ **DATE:** _____

SPOUSE (SIGNATURE) _____ **DATE:** _____

Notes: _____

