

# Sure Tax

32811 Utica Road – Suite A, Fraser, MI 48026 – 586-285-8300

## NEW CLIENT – FORM

Name \_\_\_\_\_ Date: \_\_\_\_\_

Phone Number: \_\_\_\_\_ DOB: \_\_\_\_\_

SSN \_\_\_\_\_ Occupation \_\_\_\_\_

Email: \_\_\_\_\_

Driver License \_\_\_\_\_ Issue Date \_\_\_\_\_ Exp Date \_\_\_\_\_

Spouse DL \_\_\_\_\_ Issue Date \_\_\_\_\_ Exp Date \_\_\_\_\_

Have you checked your W2's for correct SSN? YES/ NO      Correct address on W2? YES/ NO

Michigan Resident full year? YES/ NO      School District: \_\_\_\_\_

Did you include your Property Taxes and Mortgage Interest Statements? YES/ NO

Marital/Dependant Status Changes? YES / NO      Current Marital Status: SINGLE/ MARRIED

Spouse \_\_\_\_\_ SSN \_\_\_\_\_ DOB \_\_\_\_\_ Occupation \_\_\_\_\_

Dependents: YES/ NO      Did dependents live with you all year? YES/ NO

Name \_\_\_\_\_ SSN \_\_\_\_\_ DOB \_\_\_\_\_

Name \_\_\_\_\_ SSN \_\_\_\_\_ DOB \_\_\_\_\_

Name \_\_\_\_\_ SSN \_\_\_\_\_ DOB \_\_\_\_\_

Rent: \$ \_\_\_\_\_ per month      Name & Address to whom rent is paid:

\_\_\_\_\_

Direct Deposit? YES/ NO

Bank \_\_\_\_\_ Account # \_\_\_\_\_ Routing # \_\_\_\_\_

**Please visit our website to upload form & supporting documentation: [www.suretaxllc.com](http://www.suretaxllc.com)**