

# Sure Tax

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

## CURRENT CLIENT - DROP OFF FORM

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

Spouse \_\_\_\_\_ Best Contact # \_\_\_\_\_

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

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

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

Have you checked all W2's for the correct SSN? YES/ NO

Have you checked all W2's for the correct address? YES/ NO

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

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

\_\_\_\_\_

Did you want Direct Deposit? YES/ NO Any Changes to Bank Account? YES/ NO

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

Any New or Loss of claiming Dependents? (N or L circle one)

Name \_\_\_\_\_ SSN \_\_\_\_\_ DOB \_\_\_\_\_ N or L

Name \_\_\_\_\_ SSN \_\_\_\_\_ DOB \_\_\_\_\_ N or L

Name \_\_\_\_\_ SSN \_\_\_\_\_ DOB \_\_\_\_\_ N or L

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