



## H&R Tax Solutions, LLC.

# 2026 NEW CLIENT INFORMATION FORM

Please complete form as accurately as possible to help us prepare your tax return efficiently and avoid delays.

**Phone/Text: (562) 378-0468 | [clientservices@hrtaxsolutions.com](mailto:clientservices@hrtaxsolutions.com)**

**Client Referred By:** \_\_\_\_\_

### 1. PERSONAL INFORMATION

*(If Married, See Page3 for Spouse Information)*

Taxpayer Name: \_\_\_\_\_

Taxpayer SSN or ITIN: \_\_\_\_\_

Taxpayer Date of Birth: \_\_\_\_\_

Taxpayer Occupation: \_\_\_\_\_

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

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

Mailing Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

### 2. FILING STATUS

- Single
- Married Filing Jointly
- Married Filing Separately (requires to leave apart from spouse during tax year)
- Head of Household (you must have a dependent for this filing status)
- Qualifying Widow(er)



## H&R Tax Solutions, LLC.

### 3. DEPENDENTS

1. Dependent Name: \_\_\_\_\_

Relationship: \_\_\_\_\_ DOB: \_\_\_\_\_

SSN/ITIN: \_\_\_\_\_ Months Lived With You: \_\_\_\_\_

2. Dependent Name: \_\_\_\_\_

Relationship: \_\_\_\_\_ DOB: \_\_\_\_\_

SSN/ITIN: \_\_\_\_\_ Months Lived With You: \_\_\_\_\_

3. Dependent Name: \_\_\_\_\_

Relationship: \_\_\_\_\_ DOB: \_\_\_\_\_

SSN/ITIN: \_\_\_\_\_ Months Lived With You: \_\_\_\_\_

**\*\* For additional dependents include them on a separate sheet of paper\*\***

### 4. COMMUNICATION CONSENT

I authorize H&R Tax Solutions to communicate with me by text message and email regarding my tax return.

### 5. ADDITIONAL NOTES

---

---

---

---

### 6. CLIENT SIGNATURE

I declare that the information provided is accurate to the best of my knowledge.

Client Signature: \_\_\_\_\_

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



## **H&R Tax Solutions, LLC.**

### **PAGE 3 – SPOUSE INFORMATION (IF APPLICABLE)**

Spouse Name: \_\_\_\_\_

Spouse SSN or ITIN: \_\_\_\_\_

Spouse Date of Birth: \_\_\_\_\_

Spouse Occupation: \_\_\_\_\_

Spouse Phone Number: \_\_\_\_\_

Spouse Email Address: \_\_\_\_\_

**Thank you for choosing H&R Tax Solutions, LLC**