3001 Medlin Drive, Suite 100 * Arlington, Texas 76015 * Telephone (817)664-3000 * Fax (817)664-3001 * www.pskcpa.com

Individual Tax Onboarding Form

Personal Information

Taxpayer Name: _____ DOB:_____ SSN:_____ Primary Contact ☐

Spouse Name: _____ DOB:_____ SSN:_____ Primary Contact ☐

Mailing Address:_____

Occupation: Taxpayer_____ Spouse_____

Phone Number: Taxpayer_____ Spouse_____

Email Address: Taxpayer_____ Spouse_____

Filing Status: Single ☐ Married Filing Jointly ☐ Married Filing Separately ☐ Head of Household ☐

Dependent Information (attach additional page if needed)

Dependent 1:_____ DOB:_____ SSN:_____

Dependent 2: _____ DOB:_____ SSN:_____

Dependent 3: _____ DOB:_____ SSN:_____

Dependent 4: _____ DOB:_____ SSN:_____

Primary Bank Account Information (for scheduling electronic tax payments)

Bank Name:_____

Routing Number:_____

Account Number:_____

Information Requested

- Tax Returns (2 most recent income tax returns filed with the IRS, state, and local governments)
- Most recent month end statements for all significant investments
- Pay Stubs (most recent one in current year)
- Will, trusts, divorce decrees, separation agreements and pre or post-nuptial agreements
- A copy of the Taxpayer & Spouse's drivers licenses
- Current year tax documents

Please upload this form to our secure link at www.pskcpa.com