

# RAPI-TAX

## Personal and Commercial Tax Return Specialists Tax Information Sheet

### METHOD OF REFUND - Circle One

\_\_\_ **Direct Deposit (option 1) - Pay Rapi-Tax Preparation Fee In Advance**

\_\_\_ **Direct Deposit (option 2) - No Upfront Fees!!** Rapi-Tax preparation fees will be debited from your refund amount. In addition, there is a third party processing fee of \$19.95 for this service.

\_\_\_ **Debit Card (option 3) - Have your refund credited to a Visa Debit Card issued instantly at Rapi-Tax.**

\_\_\_ **IRS Check (option 4) - Check will arrive in approximately six (6) weeks direct from IRS.**  
(Please note payment is due in advance for this option).

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

Account # \_\_\_\_\_

### PERSONAL INFORMATION

Name: \_\_\_\_\_ Social Security #: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Occupation: \_\_\_\_\_

Driver's License/State ID# \_\_\_\_\_ State \_\_\_\_\_ Issue Date \_\_\_\_\_ Expiration Date \_\_\_\_\_

Address: \_\_\_\_\_  
(Street) (City & State) (Zip)

Phone: \_\_\_\_\_  
(Home) (Work) (Cell / Text – Yes/No)

E-MAIL Address: \_\_\_\_\_

### SPOUSE'S INFORMATION (IF APPLICABLE)

Name: \_\_\_\_\_ Social Security #: \_\_\_\_\_

Driver's License/State ID# \_\_\_\_\_ State \_\_\_\_\_ Issue Date \_\_\_\_\_ Expiration Date \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Occupation: \_\_\_\_\_

E-MAIL Address: \_\_\_\_\_

### FILING STATUS - Circle One - If unsure, ask your Rapi-Tax Representative.

Single      Married      Married/Filing Separately      Head of Household

### DEPENDANTS

Name      SSN #      Relationship      Birth Date

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\*Use back of sheet for additional dependents.

## **ADDITIONAL INFORMATION**

(If you answer yes to any of the questions below, please provide supporting information or documentation)

1. Did you file your 2013 taxes? If yes, did you provide Rapi-Tax with a copy? Yes\No	Yes	No
2. Do you owe any back taxes, delinquent child support, or delinquent student loans?	Yes	No
3. Have you supplied social security cards for all dependants? If no, are they on file with Rapi-Tax? Yes/No	Yes	No
4. Do you currently pay union dues? If yes, Union Name _____ Amount _____ Wk\Mo\Yr (circle one)	Yes	No
5. Do you currently have any work expenses including travel related work expenses? If yes, please note and/or attach documentation.	Yes	No
6. Have you or any of your dependents, attended a post-secondary (after high school) Educational institution in 2014 (this includes college, trade school, etc.)? If yes, School Name _____ Tuition _____.	Yes	No
7. Are you a homeowner? If yes, please attach information regarding mortgage interest and property taxes paid during 2014.	Yes	No
8. Have you bought or sold any property in the past year?	Yes	No
9. Did you donate cash or other goods (clothing, cars, etc.) to charities during 2014? If yes, please attach information regarding the value of your donation.  I INITIAL THAT I HAVE RECEIPTS FOR MY CHARITABLES (FROM CHARITY, CANCELED CHECK ETC.) _____	Yes	No
10. Did you incur any child care expenses during 2014? If yes, please attach information regarding the amount you paid.  Child Care Provider _____ EIN# _____ Amount _____ Address _____	Yes	No
11. Do you own any rental property? If yes, please attach information of related income or loss in 2014.	Yes	No
12. Did you take a withdrawal or cash out of any retirement plans? If yes, please attach the supporting documentation.	Yes	No

