

**Personal Income Tax Preparation**  
*Melissa Frankenberger, CPA*

[www.TaxesByMelissa.com](http://www.TaxesByMelissa.com) | Phone: (314) 920-2760 | Fax: (314) 985-0604

Thank for choosing me as your tax preparation professional. I look forward to working with you.

Please fill out the information listed below and include this form when you send your tax documents. (NOTE: e-mail is NOT a secure method to send personal information such as social security numbers).

Things To Include With This Form:

- **VOIDED CHECK (IF YOU WISH TO DIRECT DEPOSIT ANY REFUNDS.)**
- **YOUR 2010 TAXES (if you are a new customer)**

Name: \_\_\_\_\_ DOB: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

School District You Live in: \_\_\_\_\_

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

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

Social Security Number: \_\_\_\_\_

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

**Phone Numbers (needed in case I have questions):**

HOME: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

CELL: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

WORK: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

e-mail address: \_\_\_\_\_

**Dependent Information:**

NAMES:	Social Security Number:	DOB:
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