



SK FINANCIAL SERVICES CLIENT DATA MANAGER



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2006 Tax Year

Today's Date: _____

	FIRST NAME	MIDDLE INITIAL	LAST NAME	DATE OF BIRTH	SOCIAL SECURITY #
YOUR INFORMATION					
YOUR SPOUSE'S INFORMATION					

FILING STATUS

SINGLE
 MARRIED FILING SEPARATELY
 SURVIVING SPOUSE
 MARRIED FILING JOINTLY
 HEAD OF HOUSEHOLD

DEPENDENTS	FIRST NAME	MIDDLE INITIAL	LAST NAME	DATE OF BIRTH	SOCIAL SECURITY #	RELATIONSHIP
DEPENDENT (1)						
DEPENDENT (2)						
DEPENDENT (3)						
DEPENDENT (4)						

PREFERRED REFUND METHOD

DIRECT DEPOSIT
 Checking Account
 Saving Account
 ROUTING # _____
 SEND CHECK
 ACCOUNT # _____

CONTACTS

HOME PHONE _____ CELL PHONE _____ EMAIL ADDRESS _____ FAX _____

MAILING ADDRESS

STREET _____ APT # _____ CITY _____ STATE _____ ZIP CODE _____

HOW DID YOU HEAR ABOUT US?

Word of Mouth/Friend
 SK Website
 Received a Letter
 Online Advertisement
 Yellow Pages
 Business Card

FOR OFFICE USE ONLY

REFUND STATUS	DATE	COMMENT	TAX REFUND (DUE) AMOUNT
Keyed			FEDERAL
Complete			STATE 1
Sent			2
Accepted			3
Rejected			
Resent			TOTAL