



# SK FINANCIAL SERVICES CLIENT DATA MANAGER



390 Main St, Suite 658  
Worcester, MA 01608  
Ph: 508-795-7372  
Fax: 508-795-0069  
feedback@sk-financial.com  
www.sk-financial.com

2006 Tax Year

Today's Date: \_\_\_\_\_

	FIRST NAME	MIDDLE INITIAL	LAST NAME	DATE OF BIRTH	SOCIAL SECURITY #	
<b>YOUR INFORMATION</b>						
<b>YOUR SPOUSE'S INFORMATION</b>						
<b>FILING STATUS</b>	<input type="checkbox"/> SINGLE <input type="checkbox"/> MARRIED FILING SEPARATELY <input type="checkbox"/> SURVIVING SPOUSE <input type="checkbox"/> MARRIED FILING JOINTLY <input type="checkbox"/> HEAD OF HOUSEHOLD					
	FIRST NAME	MIDDLE INITIAL	LAST NAME	DATE OF BIRTH	SOCIAL SECURITY #	RELATIONSHIP
<b>DEPENDENTS</b>						
DEPENDENT (1)						
DEPENDENT (2)						
DEPENDENT (3)						
DEPENDENT (4)						
<b>PREFERRED REFUND METHOD</b>	<input type="checkbox"/> DIRECT DEPOSIT	<input type="checkbox"/> Checking Account		ROUTING #		
	<input type="checkbox"/> SEND CHECK	<input type="checkbox"/> Saving Account		ACCOUNT #		
<b>CONTACTS</b>	HOME PHONE	CELL PHONE		EMAIL ADDRESS		FAX
<b>MAILING ADDRESS</b>	STREET		APT #	CITY	STATE	ZIP CODE
<b>HOW DID YOU HEAR ABOUT US?</b>	<input type="checkbox"/> Word of Mouth/Friend <input type="checkbox"/> SK Website <input type="checkbox"/> Received a Letter <input type="checkbox"/> Online Advertisement <input type="checkbox"/> Yellow Pages <input type="checkbox"/> Business Card					
FOR OFFICE USE ONLY						
<b>REFUND STATUS</b>		DATE	COMMENT	TAX REFUND (DUE) AMOUNT		
	Keyed			FEDERAL		
	Complete			STATE 1		
	Sent			2		
	Accepted			3		
	Rejected					
	Resent			TOTAL		