SK FINANCIAL SERVICES
CLIENT DATA MANAGER

For Tax Return Year of 2005

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

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 JOINTLY
- ☐ MARRIED FILING SEPARATELY
- ☐ HEAD OF HOUSEHOLD
- ☐ SURVIVING SPOUSE

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	ROUTING #	
	☐ SEND CHECK	☐ Saving Account	ACCOUNT #	

CONTACTS	HOME PHONE	CELL PHONE	EMAIL ADDRESS	FAX

MAILING ADDRESS	STREET	APT #	CITY	STATE	ZIP CODE

HOW DID YOU HEARD ABOUT US?	

FOR OFFICE USE ONLY

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