



# BUTLER, LAVANCEAU & SOBER, LLC

Certified Public Accountants

## Client Information Sheet

10450 Shaker Drive, Suite 112

Columbia, MD 21046

410-997-9299 [www.blscpa.com](http://www.blscpa.com)

### Taxpayer

Last Name

First Name

SSN

Date of Birth

Day Time No.

Mobile No.

Occupation

Email

Current Address

City

State

Zip

County

### Spouse (if any)

Last Name

First Name

SSN

Date of Birth

Day Time No.

Mobile No.

Occupation

Email

Have you moved since filing your last return?

Date of Move

### Do you have IRA accounts?

Roth  Traditional

### Do you have IRA accounts(Spouse)?

Roth  Traditional

### Filing Status

Married Filing Jointly

Married Filing Separately

Single

Head of Household

### Dependents

Legal Name	Date of Birth	SSN	Lived with Taxpayer all year Y or N

### Bank Account for Direct Deposit of Refunds:

Name of Bank

Routing Number

Account Number

Checking or Saving

How did you hear about us

When are you typically ready for tax prep?

How do you prefer contact with our office?

Mos

Day

In Person

Phone

Email