



Rutherford, Taylor & Company, P.C.

Certified Public Accountants • Greenville, Texas • Established 1980

Individual Client Information

TAXPAYER AND SPOUSE

	First name and middle initial	Last name	Occupation	Date of birth	Social Security number
Taxpayer					
Spouse					

Physical street address

Mailing address (if different)

City / State / Zip

CONTACT INFORMATION

Cell phone		Primary email	
Work phone, taxpayer		Work phone, spouse	
Home / alternate phone		Fax number	

DEPENDENTS

	First name and middle initial	Last name	Relationship	Date of birth	Social Security number
Dependent 1					
Dependent 2					
Dependent 3					

Important: if you have a new child, we will need a copy of their Social Security card.

DIRECT DEPOSIT (BANKING) INFORMATION

Institution (bank)			
Routing number		Account number	
Account type	☐ Checking ☐ Savings		

FOR OFFICE USE ONLY

Client ID #		Responsible professional		Date received	
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