

RIEDIGER ACCOUNTANCY, P.A.

Certified Public Accounting and Tax Preparation

2017 Client Information Form

SIDE 1 OF 2

SECTION 1 – CONTACT INFORMATION

Name	Daytime Phone	Mobile Phone
Taxpayer		
Spouse		

Business Name	Phone	Fax
Provide your business name if a sole proprietor or LLC.		

Email Addresses

An email address enables us to provide confirmation for e-filed tax returns, email invoices and monthly statements, and better communicate with you on your accounting and tax matters. As tax materials contain personal and confidential information, list only private email addresses. Indicate delivery preferences for tax returns, invoices, and statements in section 4, on reverse.

Taxpayer
Spouse

Address

Provide your current official or primary address.

Address		
City	State	Zip

Mailing Address

Provide your current mailing address, if different.

Address		
City	State	Zip

Communication Preferences

Please indicate your preferences by circling your selection for each item below.

Primary Contact	Preferred Contact Method
TAXPAYER SPOUSE BOTH	DAYTIME PHONE BUSINESS PHONE MOBILE PHONE EMAIL

Continued on reverse ⇨

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SECTION 2 – IDENTITY AUTHENTICATION

In order to combat and prevent identity theft, the Internal Revenue Service, in partnership with state tax authorities, implemented various checks to verify and confirm taxpayer identity for electronically filed income tax returns. States began verifying taxpayer identity using driver's license or state identification information last year. This information is required to complete and electronically file your tax returns.

Provide current driver's license or state identification card information for taxpayer and spouse, as indicated below.
For Type, enter DL, for driver's license, or ID; for identification card.

Name on Driver's License / ID	Type	Driver's License / ID Number	State	Issued	Expires
Taxpayer					
Spouse					

SECTION 3 – ELECTRONIC TAX REFUNDS AND PAYMENTS

Tax Refund Direct Deposit

Specify your electronic tax refund preferences below. Direct deposit refunds are generally processed faster.

- No, process tax refunds by mailed check.
- Yes, direct deposit FEDERAL tax refund.
- Yes, direct deposit MN tax refund.
- Yes, direct deposit all other state tax refunds.

Tax Payment Electronic Funds Withdrawal (EFW)

Specify your electronic tax payment preferences below. We will contact you to confirm payment amount(s) and dates(s) **before** processing.

- No, I will pay all taxes due.
- Yes, EFW for FEDERAL income tax due.
- Yes, EFW for FEDERAL estimated tax payments for: 1st 2nd 3rd 4th quarter 2018.
- Yes, EFW for MN income tax due.
- Yes, EFW for all other state income taxes due.

Bank Account Information

Provide bank account details if you answered YES for any direct deposit or electronic funds withdrawals (EFW) above.

For Type, enter CHECKING or SAVINGS; for Joint?, enter YES, if joint account, otherwise NO. Note: Bank account holder name must match taxpayer name reported on Form 1040. We will provide you with a form to verify and authorize these transactions prior to processing or filing your income tax returns.

Bank Name	Type	Routing	Joint?	Account

SECTION 4 – DELIVERY PREFERENCES

Specify your delivery preferences for each item below.

Tax Return			Invoices / Statements		Tax Organizer		
PICKUP	EMAIL	MAIL*	EMAIL	MAIL	MAIL	EMAIL	ONLINE

* A fee of \$25.00 is charged for income tax returns sent by First Class US Mail; additional charges apply for priority or overnight delivery.