

**HERRON & ASSOCIATES
TAX SERVICES, LLC
INFORMATION WORKSHEET**

Name _____ Spouse's Name _____

SSN _____ Spouse SSN _____

Occupation _____ Spouse Occupation _____

Date of Birth _____ (mmddyyyy) Spouse _____ (mmddyyyy)

Telephone #: Work _____ Home _____ C _____

Spouse Tele#: Work _____ Home _____ C _____

Address _____
Street City State/ZIP

Can we print your telephone #s on your tax return?

If yes, your home ____ work ____

Identification: Type (DL) or (State ID) # _____ (Spouse) # _____
Issue Date _____ Issue Date _____
Expire Date _____ Expire Date _____

Email address: _____

Do you want your completed tax return emailed? ____yes ____no

Are you self-employed? ____yes ____no

If yes, do you have the following?

- Tax identification number other than your social security number? ____yes ____no

If yes, please provide your number _____

- Business license? ____yes ____no

If yes, do you want your business license renewed? ____yes ____no

Are you a Limited Liability Company (LLC)? ____yes ____no

If yes, do you want to renew your LLC status? ____yes ____no

Dependent:	Name	SSN	Date of Birth (mmddyyyy)	Relationship

Did your dependent(s) live with you? **yes** **no**

Did you have health insurance for the entire year? **yes** **no**

If yes, were you issued a Form 1095-A, 1095-B, or 109-C from your insurance company? **yes**
 no

Was your dependents covered by your insurance policy? **yes** **no**

If no, were they insured by someone else and was a Form 1095-A, 1095-B, or 1095-C issued that shows they were covered? **yes** **no**

If yes, a copy of the form must be provided.

Do you want the tax preparer's name & telephone # printed on your tax return? **yes** **no**

Refund Options:

Paper Checks: **yes** **no**

Your tax return is mailed directly to the IRS and your refund check will be mailed to the address shown above. It takes approximately 4 to 6 weeks. Payment for tax preparation required at the time the tax return is completed.

E-file: **yes** **no**

- If yes, then your refund can be direct deposited into your bank account direct from the IRS or through the bank associated with Herron & Associates Tax Services, LLC.

Your tax return is submitted electronically and you will receive your tax refund within 14 to 16 days. Your tax refund can be mailed, direct deposited into your bank account, or to your bank card.

Direct Deposit from the IRS to your bank account or to your bank card: **yes** **no**

Your refund amount will be directly deposit into the bank account or on to your bank card within 10 days. Tax preparation payment is required at the time the tax return is completed.

Do you chose this option? **yes** **no**

If yes, you **must** provide the following:

Saving _____ **Checking** _____

Name of Bank _____

Bank Routing # _____ (Nine digits found at the left bottom of check.) If saving account only, then contact bank for this information.

Account # _____

Bank Product

Payment for the tax preparation is not required at the time the tax return is completed and your refund is sent from the IRS to the bank that is associates with Herron & Associates Tax Services, LLC. The bank will deduct the tax preparation fee and its processing fees. Your refund can either be received in a bank check printed at Herron & Associates Tax Services, LLC, directed deposited into your bank account, or on to a bank card. This process is called Refund Transfer.

Do you chose the bank product option: yes no

- If yes, you **must** provide the following:

Saving _____ Checking _____

Name of Bank _____

Bank Routing # _____ (Nine digits found at the left bottom of check.) If saving account only, then contact bank for this information.

Account # _____

Copies of Form W-2 (and Form 1099 if applicable), picture identification (i.e. Driver License or work ID), and dependent social security number (social security card, school record) are required at the time this form is submitted.

Do you have a tax obligation with the IRS that requires repayment? yes____ no____

Are you currently under bankruptcy? yes____ no____ If yes, are there any unpaid tax obligations? yes____ no____

Have you ever been refused Earn Income Credit by the IRS? yes____ no____ n/a____

Certification Statement: I certify that the information contained herein is true and accurate to the best of my knowledge. I authorize the preparer (Herron & Associates Tax Services, LLC) to submit my tax return on my behalf. Under penalty of perjury, I certify that the preparer has not in any way provided any information in an attempt to secure additional funds that I am not entitled.

SIGNATURE/DATE

SPOUSE'S SIGNATURE (if applicable)/DATE

