



CLIENT INTAKE FORM – TAX YEAR 2025

Upload Date _____ (please email leann@franketax.com when you are finished uploading)

Name _____

Address _____

If you moved between states in 2025, please provide the date you moved: _____

Phone # _____

Email(s) _____

Were there any significant changes in 2025? (examples: dependents, filing status, etc.) _____

Client Questions / Notes:

(Office use only)

Preparer Notes:

☐ Completed

(continued on back of page)

Refunds / Balance Due

All refunds will be directly deposited into the bank account you choose below.

If you have a federal and/or state balance due, how would you like to make the payment?

- ☐ Direct Debit (ACH) – April 15, 2026
- ☐ Taxpayer initiated online payment(s)
- ☐ I am requesting voucher(s) to pay by paper check(s) **(DISCOURAGED)**

If you have federal and/or state estimate payments for 2026, how would you like to make those payments?

- ☐ Direct Debit (ACH) – withdrawn on due dates
- ☐ Taxpayer initiated online payment(s)
- ☐ I am requesting voucher(s) to pay by paper check(s) **(DISCOURAGED)**

Bank Account

To ensure the correct bank information is on file, please provide the following:

Type of account: ☐ Checking ☐ Savings

Bank Name _____

Routing Number _ _ _ _ _

Account Number _____

*Signature to authorize direct deposit and/or ACH payment(s): _____

Completed Return

We will contact you once the return is complete. How would you like to sign for the return?

- ☐ In person – stop by our office to sign for your return
- ☐ DocuSign – sign electronically via email, please provide email(s)

How would you like to receive your copy of the final tax return?

- ☐ Printed – paper copy for your file cabinet
 - ☐ Electronic – uploaded to your client portal, Revver
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