

## New Client Information

Please complete and return to Cover & Rossiter via email ([intake@coverrossiter.com](mailto:intake@coverrossiter.com)), fax (302-656-1811 Attn: Intake), or mail (2711 Centerville Rd, Ste 100, Wilmington, DE 19808). We look forward to serving you!

### Taxpayer

First Name and Initial	Last Name	Social Security Number	
Occupation	Date of Birth (Mo/Da/Yr)	Date of Death (Mo/Da/Yr)	
Driver's License or State Issued ID Number	Expiration Date (Mo/Da/Yr)	Issue Date (Mo/Da/Yr)	State

### Spouse

First Name and Initial	Last Name	Social Security Number	
Occupation	Date of Birth (Mo/Da/Yr)	Date of Death (Mo/Da/Yr)	
Driver's License or State Issued ID Number	Expiration Date (Mo/Da/Yr)	Issue Date (Mo/Da/Yr)	State

### Contact Information

Street Address		Apartment Number	
City	State	Zip or Postal Code	
Foreign Province or County		Foreign Country	
Taxpayer Daytime/ Work Phone	Taxpayer Evening/ Home Phone	Taxpayer Foreign Phone	
Taxpayer Cell Phone	Taxpayer Fax Number	Taxpayer Email Address	
Spouse Daytime/ Work Phone	Spouse Evening/ Home Phone	Spouse Foreign Phone	
Spouse Cell Phone	Spouse Fax Number	Spouse Email Address	
Preferred Method of Contact ( <i>phone - specify which number OR email - specify which address to use</i> )			

**Dependent Information**

	First Name and Initial	Last Name	Social Security Number	Date of Birth (Mo/Da/Yr)	Relationship to Taxpayer
A					
B					
C					
D					
E					
F					
G					

Did dependent have income over \$4,050?



	Months Lived in Your Home	X if Disabled	Yes or No	Identity Protection PIN
A				
B				
C				
D				
E				
F				
G				

Provide the name of any dependent who is not a U.S. citizen or Green Card holder.

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Provide the name of any person living with you who is claimed as a dependent on someone else's tax return.

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List the years that a release of claim to exemption is given for a dependent child not living with you.

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How did you hear about us?

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Is there anything else you would like to share with us at this time so that we may provide you with the best possible service?

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