



South Shore Accounting and Tax Service, LLC

New Client Form

Today's Date: __/__/__

Single, MFJ, MFS, HOH: _____

Taxpayer

Spouse

First name: _____ Last _____

First name: _____ Last _____

DOB: __/__/__

DOB: __/__/__

SSN: __-__-__

SSN: __-__-__

Address: _____

Town: _____ State _____ Zipcode: _____

Email: _____ Email: _____

Telephone: _____ Telephone: _____

Occupation: _____ Occupation: _____

License# _____ State _____

License# _____ State _____

Issue date: __/__/__

Issue Date: __/__/__

Exp Date: __/__/__

Exp Date: __/__/__

Bank Information: (If you would like Direct deposit or Automatic withdrawal)

Bank name: _____ Routing # _____ Checking# _____

Rent

If you rent, please provide the following:

Landlord Name _____ Landlord Address: _____

Apartment address: _____ How much you paid

monthly: _____ Dates rented: __/__/__ - __/__/__

Dependents

Child(1)Name: _____

Child(2)Name:) _____

SSN: __-__-__

SSN: __-__-__

DOB: __/__/__

DOB: __/__/__

Child(3)Name: _____

Child(4)Name: _____

SSN: __-__-__

SSN: __-__-__

DOB: __/__/__

DOB: __-__-__

Child Care Expenses: Please provide documents for child care expenses if apply to you. Amount as well as the institution information

Other information:

***All Tax Returns are sent to your Onvio Client Portal.** Once you have returned this form, we will send you a link to register your Onvio account. You will be able to upload all your documents there securely. You will also be able to receive your E-File forms to sign, see previous tax returns filed with SSATS, and request/receive documents. Please refer to the link below for instructions on how to register with Onvio and how the portal works. If you do not wish to use this portal or have any questions, please let us know! *Documents should be uploaded under the year of the tax filing ex.(2022-Tax Docs 2022)*

Onvio Client Guide Link: <https://onvio.ca/ua/help/-pdfs/us-en/nosearch/client-center-guide.pdf> (Copy & Paste into web browser)

