

**TAX RETURN INFORMATION**  
ALL RETURNS WILL BE ELECTRONICALLY FILLED

TAX AND FINANCIAL SERVICE CHECKLIST	YES	NO	DISCUSS	N/A
Will your retirement income be sufficient to maintain your lifestyle after you stop working?				
Would your family still be able to work towards their financial future if disability, death, etc happened to you?				
Do you have sufficient savings so your children can attend the college of their choice?				
If you are currently self employed, are you prepared to meet your financial obligations in the event you were disabled?				
Do you have investment income you are paying taxes on every year? If so, would you like to learn how to keep those dollars in you pocket?				
Do you currently have retirement available to you at work?				
Do believe that your mortgage interest rate is as low as it could be?				
Would you be interested in a complimentary financial analysis?				

Above information provided by, and to the best of my knowledge and belief are true, correct and complete.

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Database Update – Please Print**  
(Please Fill out all shaded areas)

Taxpayer's Name \_\_\_\_\_ S.S.# \_\_\_\_\_ DOB \_\_\_\_\_  
 Home Phone \_\_\_\_\_ Cell \_\_\_\_\_ Work \_\_\_\_\_  
 Best Number to be reached at \_\_\_\_\_  
 Occupation \_\_\_\_\_ Email Address \_\_\_\_\_  
 Home Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_  
 Spouse's Name \_\_\_\_\_ S.S.# \_\_\_\_\_ DOB \_\_\_\_\_  
 Home Phone \_\_\_\_\_ Cell \_\_\_\_\_ Work \_\_\_\_\_  
 Best Number to be reached at \_\_\_\_\_  
 Occupation \_\_\_\_\_ Email Address \_\_\_\_\_

PLEASE CONTACT HILLS & FRANK FINANCIAL GROUP WHEN THERE IS A CHANGE IN YOUR TELEPHONE NUMBER. THIS IS EXTREMELY IMPORTANT IN ORDER TO CONTACT YOU REGARDING YOUR TAX RETURN.

**FILLING STATUS:**

(Circle One): Single Married/Joint Married/Separate Head of Household Qualifying Widow (er)

**DEPENDENTS:**

NAME first/mi/last	Date of Birth	Social Security Number	Relationship

Did you have any out - of - state purchase (by mail order or internet) in 2009? If so, how much: \$ \_\_\_\_\_

- Direct Deposit ( NO Additional Charge)
- Checking account – Copy of check or account to be deposited
- Savings Account \_ copy of deposit slip for account to be deposited
- Mail refund to address on tax return

**NOTE !** We must have new voided check each year