



Tax Payer Application

STEP 1 Personal Information

1. First name, Middle name, Last name, & Suffix			
2. Social Security number/Tax ID Number	3. Date of birth (mm/dd/yyyy)		4. Sex Male <input type="checkbox"/> Female <input type="checkbox"/>
5. Home address			6. Apartment or suite number
7. City	8. State	9. ZIP code	10. County
11. Phone number () <input type="checkbox"/> Cell <input type="checkbox"/> Home <input type="checkbox"/> Work	12. Cell Phone Carrier	13. Email Address	
14. Filing Status Single <input type="checkbox"/> Married filing Jointly <input type="checkbox"/> Head of household <input type="checkbox"/> Widow(er) <input type="checkbox"/> Married filing Separately <input type="checkbox"/>			
15. Drivers License #	16. Issue Date	17. State	18. Expiration Date

STEP 2 Dependent Information

1. Full Name	2. Relationship	3. DOB	4. SSN
1. Full Name	2. Relationship	3. DOB	4. SSN
1. Full Name	2. Relationship	3. DOB	4. SSN
1. Full Name	2. Relationship	3. DOB	4. SSN
1. Full Name	2. Relationship	3. DOB	4. SSN
1. Full Name	2. Relationship	3. DOB	4. SSN

STEP 3 Refund Disbursement Options

Bank Name: _____

Check
 Debit Card
 Direct Deposit
 Routing #: _____ Account #: _____

Marion F. Morris (nor service bureau or software provider) is not responsible for any delay or loss of funds due to incorrect or incomplete information supplied by me or by my financial institution or due to an error on the part of my financial institution in depositing funds to my account.

_____ Signature

I hereby authorize Marion F. Morris to prepare and file my federal and/or state income taxes. I understand that by signing and submitting the application, I am submitting to the process of tax preparation by Marion F. Morris. I also authorize Marion F. Morris to deduct preparation fees and all other associated fees from my tax refund as payment for services rendered. By signing this application I acknowledge that the information provided is true and factual and bear the sole responsibility to provide all supporting documentation.

Signature	Date (mm/dd/yyyy)
Referred By	Agent Code