

ATS Income Tax Info Sheet

General Information

Filing Status: Single Head of Household Married Joint Married Separate

Name: _____ Social Security Number: _____
First & Last Name on your Social Security Card

Date Of Birth: _____ Home Phone: _____ Cell: _____

Address: _____ City: _____ State: _____ Zip: _____

Email: _____

If filing Married Filing Joint or Separate

Spouses Name: _____ Social Security Number: _____
First & Last Name on your Social Security Card

Date Of Birth: _____ Home Number: _____ Cell: _____

Email: _____ Date of Death: _____

Children / Dependents (Living In Your Household)

Name: _____ Social Security Number: _____
First & Last Name on their Social Security Card

Date Of Birth: _____ Relationship To You: _____ Months In Your Home: _____

Name: _____ Social Security Number: _____
First & Last Name on their Social Security Card

Date Of Birth: _____ Relationship To You: _____ Months In Your Home: _____

Name: _____ Social Security Number: _____
First & Last Name on their Social Security Card

Date Of Birth: _____ Relationship To You: _____ Months In Your Home: _____

Name: _____ Social Security Number: _____
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Name: _____ Social Security Number: _____
First & Last Name on their Social Security Card

Date Of Birth: _____ Relationship To You: _____ Months In Your Home: _____

General Tax Information

Did you have overtime in 2025? Yes / No_____ If so, we need your last pay check stub per job.

Did you purchase a NEW vehicle in 2025? Yes / No_____ If so, we need supporting documents as well as the amount of interest you paid on the loan during 2025.

Did you pay Estimated Tax (Quarterly Tax) Payments during 2025? Yes/ No_____

Direct Deposit Information

I authorize Anchor Tax Service to direct deposit my income tax refund into the following account,

Name of Bank: _____ Routing Number: _____

Account Number: _____

ATTENTION

I understand by claiming the dependents on my return that I am responsible to show proof of eligibility for each dependent claimed should the IRS want proof (School records, Medical records, Birth Certificate, Utility Bills, etc...). I am also agreeing that I have the right to claim these dependents per the guidelines of the IRS. These dependents lived with me the last half the year, and I supported them with a place to live, clothing, food, etc...
I also attest that NO ONE ELSE HAS CLAIMED THESE DEPENDENTS and that I HAVE THE RIGHT TO CLAIM THEM ON MY PERSONAL INCOME TAX RETURN.

I submit that all information on this form is true and correct to the best of my knowledge.

Signature of First Filer

Signature of Joint Filer