



M.K. Stark Co.
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La Verne, Ca. 91750

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(909) 596-5001 / (909) 596-2732 -Fax

NEW Client information: THIS IS A REQUIRED DOCUMENT

Name: _____ Spouse: _____

Occupation: _____ Spouse Occupation: _____

Social Security# _____ Spouse SS# _____

Mailing address: _____

City: _____ ST: _____ ZIP: _____

Phone Number: _____ Spouse _____

Email Address: _____ Spouse _____

Dependents:

Name: _____ DOB: _____ SS# _____

Name: _____ DOB: _____ SS# _____

****Please add any additional dependents on the back side of this paper****

Bank Name: _____ Checking _____ Savings _____

Banking: Account#: _____ Routing# _____

Did you receive any stimulus payment in 2021? Amount: _____

Did you receive Child Tax Credit Payments? Total Amount in 2021: _____

We will also need the following:

1. Copy (copies) of current driver's license (This is a federal requirement)
2. Notification of any major changes (occupation, marriage, buying or selling of house, new child)
 - 2a. _____
 - 2b. _____

You can now go to our website (www.mkstarkco.com) and download any of the documents needed for your tax preparation. Please make sure and bring all needed documents **including your previous year taxes** to your appointment or send all copies of documents if are sending in or have a zoom appointment. In case you have questions, please feel free to contact us anytime.

**Thank you in advance,
M.K. Stark Team**