



**Burchett Financial Services**  
 8426 Medical Plaza Drive, Suite 300  
 Charlotte, NC 28262  
 PHONE: 704-549-9401 FAX 704-549-1340

Joyce Burchett, EA.

**NEW CLIENT INFORMATION/UPDATE/DROP-OFF SHEET**

TAXPAYER

SPOUSE

Full Name: \_\_\_\_\_

\_\_\_\_\_

SS# \_\_\_\_\_

\_\_\_\_\_

Date of Birth: \_\_\_\_\_

\_\_\_\_\_

Home Address: \_\_\_\_\_

\_\_\_\_\_

Home Phone: \_\_\_\_\_

\_\_\_\_\_

Work Phone: \_\_\_\_\_

\_\_\_\_\_

Cell Phone: \_\_\_\_\_

\_\_\_\_\_

(Please check which phone number is the best to reach you during reg. business hours)

E-mail Address: \_\_\_\_\_

Other e-mail: \_\_\_\_\_

(Please mark which e-mail we can send notices and newsletters to) Do you want to have refund, if any, directly deposited at no fee? (Yes) (No)

Bank: \_\_\_\_\_ Routing# \_\_\_\_\_ Account# \_\_\_\_\_

Do you want to E-file your returns (at an additional \$50 fee)? (Yes) (No)

Desired Completion Date: \_\_\_\_\_

Desired method of pick-up or mailing: \_\_\_\_\_

(If you choose to have it mailed, we charge between \$5-15 depending on the size and weight)

Did you receive the first stimulus check in the summer of 2020? \_\_\_\_\_

How much was your check? \_\_\_\_\_

Did you receive a second stimulus check in January 2021? \_\_\_\_\_

How much? \_\_\_\_\_

I understand that my desired pickup date will be the targeted completion time and when the return is completed and ready for pickup, the office will call/e-mail me and let me know of its completion. Please do not call the office before that desired date. I certify that I have reviewed and have completed the Reminder Checklist for completion of my tax return and that it is complete.

\_\_\_\_\_  
 Burchett Financial Service Agent Client

Dropped off and signed on: \_\_\_\_\_ Log # \_\_\_\_\_

Date

**NEW CLIENTS ONLY**

Who referred you? \_\_\_\_\_

**Dependent Information:**

**Full Name** \_\_\_\_\_ **SS#** \_\_\_\_\_ **Date of Birth** \_\_\_\_\_

\_\_\_\_\_ M/F

\_\_\_\_\_ M/F

\_\_\_\_\_ M/F

(Write on back of page if needed)