



BRILLIANT ACCOUNTING

Stephen G. Brilliant, M.S., CPA

421 Courtyard Drive, Hillsborough, NJ 08844

Tel: (908) 725-1000 | Fax: (908) 725-4950 | Web: brilliant.cpa



Taxpayer:

Spouse:

SSN #: _____

First Name: _____

Last Name: _____

Date of Birth: _____

Occupation: _____

Email: _____

Primary phone: _____

Primary Phone: _____

Home Cell Work

Home Cell Work

Preferred form of communication: _____

Preferred form of communication: _____

Yes, I want to receive exclusive updates, offers, and news via text message from Stephen G. Brilliant, M.S., CPA. By providing my phone number and checking this box, I agree to receive recurring messages related to my tax documents. Message and data rates may apply. Reply STOP to unsubscribe at any time. View our Privacy Policy online at www.brilliant.cpa.

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Military Veteran: Yes No

Yes No

Legally blind: Yes No

Yes No

Dependent of another taxpayer: Yes No

Yes No

Street Address: _____

Town: _____ State: _____ Zip: _____

County: _____ School District (CA, NY, & PA Clients Only): _____

Dependents/Home Residents:

First Name:	Last Name:	DOB:	SSN#:	Relationship:
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Direct Deposit/ Electronic Funds Withdrawal Information:

If you would like to have a refund deposited directly or a balance due debited directly into/from your bank account, please enter the following information:

Financial Institution: _____ Type of Account (1 Savings, 2 Checking) _____

Routing #: _____ Acct #: _____

We provide one copy of your tax return each year:

Please check **one** method of receipt:

Be advised:

- Paper**
- Onvio Portal**
- Email**

- New York State Requires a ‘wet’ signature on Onvio e-signature. No copies or scans of signatures will be accepted.
- If you opt for a digital or email copy you will not receive a paper copy of your returns and it is your responsibility to print and save your tax returns.
- Additional copies will be \$25 per request. We need **two different emails** on file if you are filing a joint tax return and select the Onvio Portal

Office Use Only:
Date Entered: _____ Staff Initial _____