



New Client Sheet - Individual

Let's talk about you!

Date _____
 Taxpayer Last, First, Middle _____ Spouse Last, First, Middle _____
 Taxpayer Nickname _____ Spouse Nickname _____
 Taxpayer Social Security Number _____ Spouse Social Security Number _____
 Taxpayer Date of Birth _____ Spouse Date of Birth _____
 Taxpayer Occupation _____ Spouse Occupation _____

Please circle the primary way you would like us to communicate with you.

Home Phone _____
 Taxpayer Cell Phone _____ Spouse Cell Phone _____
 Taxpayer Work Phone _____ Spouse Work Phone _____
 Taxpayer Fax Number _____ Spouse Fax Number _____
 Taxpayer Email _____ Spouse Email _____
 Home Address _____
 City _____ State _____ Zip _____
 County of Residence _____

Dependent Information *(If you need more room, please write this information on a separate sheet.)*

Legal Name (as it appears on Social Security Card) Relationship (Son or Daughter) Date of Birth Social Security Number

Do you have a Schedule C business? YES NO Do you have an OL-3 account number? YES NO
 If YES, Business Name _____ If YES, OL-3 account number _____
 If YES, Does Business Require KY Form 725 YES NO
 If YES, Software used ___ QuickBooks, Version _____
 ___ Peachtree ___ Other _____
 Password _____

If you are expecting tax refunds and would like your tax refund deposited directly from the government entities into your checking account, please provide us with a voided check.



How did you hear about our firm?
 ___ Referred by _____
 ___ AT&T Real Yellow Pages
 ___ Facebook
 ___ Internet
 ___ Twitter
 ___ Yellow pages.com/ White pages.com
 ___ Other _____

Do you have a Facebook page?
 ___ Yes ___ No

Do you have a Twitter account?
 ___ Yes ___ No

Would you like to hear more about our online portal?
 ___ Yes, please ___ No, thank you

Do you have a Smart Phone?
 ___ Yes, Android ___ Yes, iPhone
 ___ No

Individual Client Services/Fees

To be filled in by Accountant

Engagement / Fee Estimates			
Engagement/Project	Fee	Engagement/Project	Fee
INDIVIDUAL CLIENT		SCHEDULE C BUSINESS	
TAX SERVICES		TAX SERVICES	
1040 (Individual)		KY 725 (Disregarded Entity)	
1040 Amend		KY 62A500 (Property Tax)	
1040 Ministers		Louisville OL-3	
1040 Past			
1040 Priority		PAYROLL TAX	
1040 Re-Do		Annual Payroll Tax	
1041 (Fiduciary – Estate)		Active Quarterly Payroll Tax	
1041 (Fiduciary – Trust)		Zero Quarterly Payroll Tax	
1041 Past		3Z4A Quarterly Payroll Tax	
709 (Gift Taxes)		Annual W-2	
		Annual 1099/1096	
CONSULT		K-1 Monthly Payroll Tax (Kentucky)	
Consult		WH-1 Monthly Payroll Tax	
Correspondence		Local Monthly Payroll Tax	
		941 Monthly Payroll Tax	
TAX PLANNING			
Tax Estimate		SALES TAX	
		Sales Tax Annual	
		Sales Tax Quarterly	
		Sales Tax Monthly	

Originator _____

Partner _____

Client ID _____

Manager _____

Accountant who met with client _____



Administrative Checklist (initial and date each line)

Set up in Practice _____	Thank you Note _____
Set up Projects _____	Services Agreement Package _____
Set up in Drake _____	Set up Project Envelope _____
Set up in Doc Mgr _____	Set up in Constant Contact _____
Interaction Sheets in Doc Mgr _____	Scan new client sheet into Doc Mgr _____