ASSOCIATES IN ACCOUNTING CPA

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

If YES, Business Name ______________________________

If YES, Does Business Require KY Form 725 YES NO

If YES, Software used ___QuickBooks, Version ____________

___Peachtree ___ Other _________

Password ______________________________

Do you have an OL-3 account number? YES NO

If YES, OL-3 account number ______________

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 ______________

Would you like to hear more about our online portal?

_____ Yes, please _____ No, thank you

Do you have a Facebook page?

_____ Yes _____ No

Do you have a Twitter account?

_____ Yes _____ No

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 ____________________