



New Client Sheet - Individual - Let's talk about you!

Effective January 1, 2018: copies of current drivers' licenses for taxpayer and spouse are required to e-file tax returns

Date _____

LEGAL NAMES (as they appear on Social Security Cards)

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 Names (as they appear on Social Security Cards) 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 _____

_____ Facebook

_____ Internet

_____ Twitter

_____ Other _____

We offer a free secure on-line portal to our clients. Let us know if you would like to learn more about this!