

CLIENT INFORMATION SHEET

(Please Print Your Information Below)

Thank you for taking time to complete this questionnaire so that we may better serve you.

Client ID: _____ Appointment Date: _____ Today's Date: _____

Marital Status on Dec 31st: Single Married Separated Divorced Widow(er)

Name: _____
(last) (first) PRIMARY TAXPAYER / HUSBAND (first) SPOUSE / WIFE

Social Security No.: _____ - _____ - _____
TAXPAYER SPOUSE

Date of Birth: TAXPAYER _____ / _____ / _____ SPOUSE _____ / _____ / _____
Month Day Year Month Day Year

Address: _____
Street City State Zip

Home Phone: (____) _____ - _____ Fax Phone: (____) _____ *

TAXPAYER Cell Phone: (____) _____ SPOUSE Cell Phone: (____) _____

TP E-mail: _____ * SP E-mail: _____ *

TP Biz Phone: (____) _____ - _____ SP Biz Phone: (____) _____

*NOTE: Provide FAX Number & E-mail address(es) that can receive CONFIDENTIAL INFORMATION

Dependent Children:

- 1) _____ SS#: _____ - _____ - _____ DOB: _____ / _____ / _____
(First Name) (Last Name) mm dd yy
- 2) _____ SS#: _____ - _____ - _____ DOB: _____ / _____ / _____
(First Name) (Last Name) mm dd yy
- 3) _____ SS#: _____ - _____ - _____ DOB: _____ / _____ / _____
(First Name) (Last Name) mm dd yy

Other Dependents:

- 4) _____ SS#: _____ - _____ - _____ DOB: _____ / _____ / _____
(First Name) (Last Name) mm dd yy

Remarks: _____

- | | | |
|--|-----|----|
| 1. Did we prepare your taxes last year? | YES | NO |
| 2. Do you own a business or sell a home, stock or mutual fund? | YES | NO |
| 3. Do you have retirement income? | YES | NO |
| 4. Do you own a corporation, partnership or Trust? | YES | NO |

Please tell us what prompted your visit

Please check all that apply...

- Internet: Site _____ You Saw Our Building / Sign _____ Newspaper Ad _____
- Phone Book Ad _____ We are in your neighborhood _____ Direct Mail Brochure _____
- You were referred to us by: _____
 friend relative business associate

This information is for Associated Accounting & Tax Services ONLY. We do not sell this information to private companies, nor do we share this information for public use, spam, and/or solicitation. However, we may send you special offers, newsletters, etc. from our organization ONLY.