

General Data:

Name(s): _____

Address: _____

City, State & Zip Code: _____

Birthday: _____

Taxpayer Cell: _____ Spouse Cell: _____

Taxpayer Email: _____ Spouse Email: _____

Reason(s) for Coming in:

Entity Information:

Legal Name: _____

DBA: _____

Address: _____

Primary Business Activity/Type: _____

Entity: Sole Proprietor / Partnership / S-Corporation / C-Corporation / LLC

Date of Incorporation: _____ Tax ID: _____

For Internal Use:

Meeting Date: _____

Engagement: Income Tax /Sales Tax /Payroll /Property /Bookkeeping /Accounting

**If applicable, please bring a copy of your prior year tax return.*

