

**NEW CLIENT INFORMATION**

TAXPAYER NAME: \_\_\_\_\_

DOB: \_\_\_\_\_

SOCIAL SECURITY: \_\_\_\_\_ (ON PY RETURN IF AVAILABLE)

ADDRESS: \_\_\_\_\_

\_\_\_\_\_

OCCUPATION: \_\_\_\_\_

WORK PHONE: \_\_\_\_\_

HOME PHONE: \_\_\_\_\_

CELL PHONE: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

SPOUSE NAME: \_\_\_\_\_

DOB: \_\_\_\_\_

SOCIAL SECURITY: \_\_\_\_\_ (ON PY RETURN IF AVAILABLE)

OCCUPATION: \_\_\_\_\_

DEPENDENT'S

NAME: \_\_\_\_\_

DOB: \_\_\_\_\_

SOCIAL SECURITY: \_\_\_\_\_ (ON PY RETURN IF AVAILABLE)

NAME: \_\_\_\_\_

DOB: \_\_\_\_\_

SOCIAL SECURITY: \_\_\_\_\_ (ON PY RETURN IF AVAILABLE)

COMMENTS: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**NEED COPY OF PRIOR YEAR RETURN**