

MIDWEST BUSINESS &  
ACCOUNTING SERVICES



2814 238th Street, Eagle, NE 68347  
Phone (402) 580-0220  
www.midwesttaxfirm.com

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**New Client Information Request**

**Taxpayer**

**Spouse**

|                                  |       |       |
|----------------------------------|-------|-------|
| First Name and Middle Initial    | _____ | _____ |
| Last Name                        | _____ | _____ |
| Social Security Number           | _____ | _____ |
| Date of Birth                    | _____ | _____ |
| Occupation                       | _____ | _____ |
| County of Residence as of Jan 1  | _____ | _____ |
| County of Employment as of Jan 1 | _____ | _____ |
| Cell Phone Number                | _____ | _____ |
| Work Number                      | _____ | _____ |
| Home Number                      | _____ | _____ |
| Email                            | _____ | _____ |
| Preferred Contact Method         | _____ | _____ |
| Address:                         | _____ | _____ |
|                                  | _____ | _____ |
|                                  | _____ | _____ |

Tax Filing Status:

Single

Married

Married Filing Separate

Head of Household

Dependents

| <i>Name (First, Middle Initial, Last)</i> | <i>Social Security Number</i> | <i>Date of Birth</i> |
|---|-------------------------------|----------------------|
| 1. _____                                  | _____                         | _____                |
| 2. _____                                  | _____                         | _____                |
| 3. _____                                  | _____                         | _____                |
| 4. _____                                  | _____                         | _____                |
| 5. _____                                  | _____                         | _____                |

Professional Advisors

Please list contact information for your below listed advisors (Name, Firm, Telephone)

Attorney: \_\_\_\_\_

Insurance: \_\_\_\_\_

Pension/Retirement: \_\_\_\_\_

Banker: \_\_\_\_\_

Current Accountant: \_\_\_\_\_

Expectations of your CPA

Why are you seeking a new Accountant?

\_\_\_\_\_

How were you referred to MBAS? \_\_\_\_\_

How frequently would you like to be in contact with your Accountant? \_\_\_\_\_

What are your expectations from your Accountant?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Please mark all the primary services you would like MBAS to perform:

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Individual Tax | <input type="checkbox"/> Payroll                        | <input type="checkbox"/> Tax Planning           |
| <input type="checkbox"/> Business Tax   | <input type="checkbox"/> Quarterly Financial Statements | <input type="checkbox"/> Business Entity Choice |
| <input type="checkbox"/> Bookkeeping    | <input type="checkbox"/> Year-End Financial Statements  | <input type="checkbox"/> QuickBooks Training    |
| <input type="checkbox"/> Other: _____   |   |   |

\_\_\_\_\_

## **What to Bring**

There are some documents you will want to collect, prior to your appointment, so that we can best serve you. Please take a moment to review the items listed and provide as many documents as available.

### **Individual Client Documents**

Please bring the below documents with you to your appointment:

- Client intake form
  - Copies of past 3 years federal and state income tax returns
  - Prior year federal and state depreciation schedules (if applicable)
  - Source documents such as W-2s, 1099s
  - Income and expenses to date if scheduled for tax planning appointment
  - Copies of any notices received from the Internal Revenue Service or other taxing agencies
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