

# NEW CLIENT FORM & ROUTE SHEET

(circle one)

**\*For both individual clients and business clients, if we did not prepare your prior year returns, please provide a copy of federal and state returns for the three previous years.**

Date: \_\_\_\_\_

**INDIVIDUAL CLIENTS:** Please complete the following information:

Referred by: \_\_\_\_\_

Taxpayer's Name: \_\_\_\_\_ SSN \_\_\_\_\_ Occupation \_\_\_\_\_

Spouse's Name: \_\_\_\_\_ SSN \_\_\_\_\_ Occupation \_\_\_\_\_

Home Address: \_\_\_\_\_  
(number, street or PO Box) (city) (state) (zip)

Taxpayer Contact Information:

Spouse Contact Information:

Home Telephone # \_\_\_\_\_ Cell \_\_\_\_\_ Cell \_\_\_\_\_  
Home Email(T) \_\_\_\_\_ Office \_\_\_\_\_ Office \_\_\_\_\_  
Home Email(S) \_\_\_\_\_ Fax \_\_\_\_\_ Fax \_\_\_\_\_  
Email \_\_\_\_\_ Email \_\_\_\_\_

Taxpayer: Date of Birth: \_\_\_\_\_ Blind? Yes \_\_\_ No \_\_\_ Other Info: \_\_\_\_\_

Spouse: Date of Birth: \_\_\_\_\_ Blind? Yes \_\_\_ No \_\_\_

State ID: State Issued: \_\_\_\_\_ ID#: \_\_\_\_\_ Date Issued: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Tax Form: 1040 US State / Other Return: \_\_\_\_\_ (Resident / Non-Resident / Part Year Resident)

Dependent Children Who Live (d) With You:

Full Name	Social Security #	Relationship	Birth Date
1.)			
2.)			
3.)			
4.)			

Other Dependents:

Full Name	Social Security #	Relationship	Birth Date	# Months Resided in Your Home	% Support Given by You
5.)					
6.)					
7.)					

Comments: \_\_\_\_\_

**BUSINESS CLIENTS:** Please complete the following information:

Date: \_\_\_\_\_

Business Name: \_\_\_\_\_ EIN/ID #: \_\_\_\_\_ Owner/Contact Person: \_\_\_\_\_

Business Address: \_\_\_\_\_  
(number, street or PO Box) (city) (state) (zip code)

Business Telephone #: \_\_\_\_\_ Business Fax #: \_\_\_\_\_ Business email: \_\_\_\_\_

Owner/Contact Person Information: Tel #: \_\_\_\_\_ Email: \_\_\_\_\_

Tax Form: 1041 / 1120 / 1120S / 1065 / 990 / W2s / 1099s / TX Franchise / Schedule C or other US State / Other: \_\_\_\_\_  
(circle) (specify)

Comments: \_\_\_\_\_