REBECCA
COCHRAN CPA LLC
PROFESSIONAL TAX AND ACCOUNTING SERVICES

INDIVIDUAL CLIENT INTAKE

Please complete the fields that apply. Use one form per individual or household.

Your information helps us prepare your account and communicate with you securely.

TAXPAYER

Full legal name

Social Security number

Date of birth

SPOUSE (if applicable)

Full legal name

Social Security number

Date of birth

CONTACT DETAILS

Street address

City

State

ZIP code

Email address

Taxpayer phone

Spouse phone (if applicable)

Referred by (if applicable)

Please return this completed form using the secure method provided by our office.

Your Social Security number and date of birth are sensitive information. Avoid sending this form through an unsecured channel.

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OFFICE USE ONLY

Internal account setup checklist - please do not complete this page as a client.

Client name:

NEW CLIENT SETUP

- [ ] Add client to contact list — Date:
- [ ] Create client folder on shared drive — Date:
- [ ] Create individual tax file — Date:
- [ ] Scan or save prior-year Form 1040 to shared drive — Date:
- [ ] Set up client in Drake Tax Software — Date:
- [ ] Set up client portal and send invitation — Date:
- [ ] Send thank-you letter for referral (if applicable) — Date:

FILE COMPLETED FORM

When setup is complete, place this form in the individual tax folder.

Complete the checklist above, then file the form in the client's individual tax folder.