



WINTERS & ASSOCIATES

YOUR HOMETOWN TAX & ACCOUNTING TEAM

New Individual Client Onboarding Form

Client Information

Name _____

Spouse _____

Phone _____

Email _____

Preferred Method of Contact _____

Date _____

Date of Birth _____

Address _____

Filing Status

Single

Married Filing Joing

Married Filing Single

Head of Household

Qualifying Widower

Other: _____

Dependents

Name _____

DOB _____

Relationship _____

Name _____

DOB _____

Relationship _____

Name _____

DOB _____

Relationship _____

Questions

Did you receive W2 Income?

Yes No

If yes, how many W2s? _____

Did you receive any self-employment income?

Yes No

Did you make any estimated tax payments?

Yes No

Are you part of a business partnership or corporation?

Yes No

Anything else we should know: _____
