

# Nelson & Pickens, L.C.

Certified Public Accountants

## REQUEST FOR QUOTE FOR TAX PREPARATION

We are only able to accept a limited number of new tax clients each year.

If your income is over \$250,000 dollars and your net worth is at least \$2,000,000 dollars, please complete the information below and send us a copy of your prior year return(s).

We will provide you a quote for the preparation of your current year return.

### CLIENT INFORMATION:

Date:

Name:

Spouse Name:

Occupation:

Spouse Occupation:

Address:

City:

State:

Zip:

Email:

Cell:

SSN:

Spouse SSN:

DOB:

Spouse DOB:

Marital Status: S M D W

Dependents:

*Name*

*DOB*

*SSN*



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