New Client Form

Basic Information Section

|  |  |
| --- | --- |
| Full Name |  |
| Birthdate |  |
| Social Security Number |  |
| Driver’s License Number |  |
| Issued Date |  |
| Expiration Date |  |
| Home Address |  |
| Occupation |  |

Spouse Basic Information (if applicable)

|  |  |
| --- | --- |
| Full Name |  |
| Birthdate |  |
| Social Security Number |  |
| Driver’s License Number |  |
| Issued Date |  |
| Expiration Date |  |
| Occupation |  |

Contact Information

|  |  |
| --- | --- |
| Cell Phone Number |  |
| Home Phone Number |  |
| Spouse Cell Phone Number (if applicable) |  |
| Preferred Method of Contact |  |

Dependent Information (if applicable)

**Dependent #1:**

|  |  |
| --- | --- |
| Full Name |  |
| Birthdate |  |
| Social Security Number |  |
| Relationship |  |

**Dependent #2:**

|  |  |
| --- | --- |
| Full Name |  |
| Birthdate |  |
| Social Security Number |  |
| Relationship |  |

**Dependent #3:**

|  |  |
| --- | --- |
| Full Name |  |
| Birthdate |  |
| Social Security Number |  |
| Relationship |  |

**Dependent #4:**

|  |  |
| --- | --- |
| Full Name |  |
| Birthdate |  |
| Social Security Number |  |
| Relationship |  |

Return Questions

Do you have a copy of last year’s tax return available?

(Yes / No)

At any time during 2022, did you: (a) receive (as a reward, award or payment for property or services); or (b) sell, exchange, gift or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

(Yes / No)