RBS Powerhouse Client Intake Form - Personal

Personal Information:

- Full Name: ________________________________
- Date of Birth: **/**/______
- Social Security Number (SSN): ___________________
- Address: ______________________________________
- City, State, ZIP: ______________________________
- Phone Number: (___**) -**
- Email Address: ________________________________

Employment & Income Information:

- Employer Name: ________________________________
- Job Title: _____________________________________
- Annual Income: $_______________________________
- Additional Income Sources (if any): ______________

Tax & Financial Information:

- Filing Status (Single/Married/Head of Household): ____________
- Do you own a home? (Yes/No) ____________
- Do you have dependents? (Yes/No) ____________
- If yes, list names and ages: ______________________
- Do you have outstanding IRS debt? (Yes/No) _______
- Are you self-employed? (Yes/No) _______
- Do you need bookkeeping services? (Yes/No) _______

Additional Notes or Special Requests:

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