

# WQZ & Company Accounting

## New Client Form

### Client Information:

Full Name:

Business Name (if applicable):

Contact Phone Number:

Email Address:

### Services Requested:

- Tax Planning
- Tax Preparation
- International Tax Services
- Estate Planning
- Financial Planning
- Retirement Planning
- Bookkeeping/Write-Up
- Business Entity Selection
- Business Succession Planning
- Business Incorporation Services
- Estate & Trust Tax Preparation
- IRS Representation
- Payroll Services
- Auditing, review and compilation
- Sales Tax Services
- Other (please specify): \_\_\_\_\_

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**Financial Information:**

Bank Name(s):

Any outstanding loans or debts:

Previous Year's Tax Return (if available):

**Additional Information:**

Any special instructions or information we should be aware of?

**Preferred Method of Communication:**

- Phone
- Email
- Mail
- In-Person Meetings

**Consent and Agreement:**

I hereby authorize WQZ & Company CPA's Accounting Firm to represent me in all matters related to my financial affairs, including tax preparation and filing. I certify that the information provided on this form is accurate and complete to the best of my knowledge.

Signature:

\_\_\_\_\_ Date: \_\_\_\_\_