

**LOPEZ & COMPANY**  
**Accountants and Tax Advisors**  
 10906 Sheldon Road Tampa FL 33626  
 PHONE 813-888-8811 FAX 800-898-0150

**NEW CLIENT INTERVIEW FORM**  
**Date:** \_\_\_\_\_

Taxpayer:	Spouse:
First Name	Spouse First Name
Middle Initial	Middle Initial
Social Security No.	Social Security No.
Occupation	Occupation
Date of Birth	Date of Birth
E-mail Address	E-mail Address:
Work Phone	Work Phone
Cell Phone	Cell Phone
Home Phone	
Driver's License <input type="checkbox"/> or State ID Card <input type="checkbox"/>	Driver's License <input type="checkbox"/> or State ID Card <input type="checkbox"/>
Issuing State	Issuing State
License or ID Num	License or ID Num
Issue Date	Issue Date
Expiration Date	Expiration Date

Street Address		
City	State	Zip Code

First Name	Social Security No.
Last Name	Relationship:
Middle Initial	Date of Birth
First Name	Social Security No.
Last Name	Relationship:
Middle Initial	Date of Birth
First Name	Social Security No.
Last Name	Relationship:
Middle Initial	Date of Birth
First Name	Social Security No.
Last Name	Relationship:
Middle Initial	Date of Birth

Please let us know how you heard of us:  
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