



Wilderman & Associates

New Client Information

Tax Year _____

Taxpayer Name _____

Spouse Name _____

Email (T) _____

Email (S) _____

Phone (T) _____

Phone (S) _____

Birthdate (T) _____

Birthdate (S) _____

Do you have Virtual Currency? _____

Do you have a Foreign Bank Account? _____

If you are expecting a refund please provide bank details or provide a copy of a check.

Bank Name _____

Bank Routing Number _____

Bank Account Number _____

Any additional details: