



**NEW CLIENT INTAKE FORM**

Legal

Entity name \_\_\_\_\_

Owner name \_\_\_\_\_

Federal EIN and Tax Return \_\_\_\_\_ Return type \_\_\_\_\_

Entity Formation State \_\_\_\_\_

Address for Entity \_\_\_\_\_

\_\_\_\_\_

Purpose of entity \_\_\_\_\_

email to be used on account \_\_\_\_\_

Please check the following:

Prior year returns requested or received \_\_\_\_\_

Addresses correct on prior year return \_\_\_\_\_

Are changes to be made to the current return type \_\_\_\_\_, if yes new type \_\_\_\_\_

When will changes occur \_\_\_\_\_

Formation Documents requested or received \_\_\_\_\_

Type of Accounting software used \_\_\_\_\_

Assigned number \_\_\_\_\_



**NEW CLIENT INTAKE FORM**

Legal  
Client Name \_\_\_\_\_

Spouse \_\_\_\_\_

Social Security Number \_\_\_\_\_

Spouse \_\_\_\_\_

Birth Dates \_\_\_\_\_

Spouse \_\_\_\_\_

Occupation \_\_\_\_\_

Spouse \_\_\_\_\_

Primary Residence State \_\_\_\_\_

Address for mailing \_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

email to be used on account \_\_\_\_\_

Please check the following:

Prior year returns requested or received \_\_\_\_\_

Addresses correct on prior year return \_\_\_\_\_

Are changes to be made to the current return \_\_\_\_\_, if yes new changes \_\_\_\_\_

When will changes occur \_\_\_\_\_

Assigned number \_\_\_\_\_