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NEW CLIENT INTAKE FORM – INDIVIDUAL

We ask that you provide the following documentation to our office upon acceptance of our services:

1. Copy of Driver's license (Spouse and/or any dependents you are claiming)
2. Copy of Social Security Card (Spouse and/or any dependents you are claiming)
3. Dates of Birth (Spouse and/or any dependents you are claiming)

Additional Information Requests:

1. All Prior Year Tax Returns
2. All Tax-Related Documentation for the Current Tax-Year

Provide your Contact Information:

Name: _____

Phone Number: _____

Primary Email: _____

Secondary Email (Required): _____

Note: Circle your preferred method of contact.

Phone *or* Email

