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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) *\*See below*

**Additional Information Requests:**

1. The Last Two Years of 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

Tax payer Date of Birth : \_\_\_\_\_

Spouse Date of Birth: \_\_\_\_\_

Dependent Name & Date of Birth: \_\_\_\_\_

Dependent Name & Date of Birth: \_\_\_\_\_

Dependent Name & Date of Birth: \_\_\_\_\_

Dependent Name & Date of Birth: \_\_\_\_\_

Additional Dependents: \_\_\_\_\_