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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*
4. Copies of IRS IP-Pin Letters (if applicable)
5. Copy of your previously filed tax return

### **Additional Information Requests:**

1. 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: \_\_\_\_\_