freeman, CPA PLLC
Financial Services for Your Business and Family

Team Member (Fed Tax/Fran./Qbooks): ________________ Other Team Member (Pay/1099/Sales): ________________

## New Client Information – For Preparing Individual Tax Returns

### Taxpayer Information

| | | | |
|---|---|---|---|
| Taxpayer Name: | ______________ | Date of Birth: | ______________ |
| Email Address: | ______________ | Work Phone: | ______________ |
| Occupation: | ______________ | Cell Phone: | ______________ |
| Employer: | ______________ | Social Security #: | ______________ |
| Nature of Business: | ______________ | Education Level: | ______________ |
| Employment Length: | ______________ | Last Year's Income: | ______________ |

Employer Address: ____________________________________________

### Additional Information

| | | | |
|---|---|---|---|
| Home Address: | ______________ | Home Phone: | ______________ |
| City, State, Zip: | ______________ | | |

### Spouse Information

| | | | |
|---|---|---|---|
| Spouse Name: | ______________ | Date of Birth: | ______________ |
| Email Address: | ______________ | Work Phone: | ______________ |
| Occupation: | ______________ | Cell Phone: | ______________ |
| Employer: | ______________ | Social Security #: | ______________ |
| Nature of Business: | ______________ | Education Level: | ______________ |
| Employment Length: | ______________ | Last Year's Income: | ______________ |

Employer Address: ____________________________________________

### Dependent Information

| | | | | | |
|---|---|---|---|---|---|
| Dependent 1 Name: | ______________ | Social Security #: | ______________ | Date of Birth: | __________ |
| Dependent 2 Name: | ______________ | Social Security #: | ______________ | Date of Birth: | __________ |
| Dependent 3 Name: | ______________ | Social Security #: | ______________ | Date of Birth: | __________ |
| Dependent 4 Name: | ______________ | Social Security #: | ______________ | Date of Birth: | __________ |

**Services to provide**:

- ☐ Federal Tax Return Preparation
- ☐ Franchise Tax Preparation
- ☐ QuickBooks / Financials
- ☐ Payroll Tax Prep. (941, 940, TWC, W-2's)
- ☐ Form 1099 Preparation
- ☐ Business Personal Property Tax
- ☐ Sales Tax Preparation
- ☐ Retirement/Invest. Management
- ☐ Life Insurance / Long Term Care
- ☐ College Education Planning
- ☐ Cash Flow & Debt Management
- ☐ Trust & Estate Planning

**Additional Notes:**

____________________________________________
____________________________________________
____________________________________________
____________________________________________

For Office Use Only:

☐ ProSeries ☐ BQE ☐ E-File Cabinet ☐ Const. Cont. ☐ Red File ☐ Blue File (Sched. C) ☐ Orange File (BPP)