England Financial
Corporation
5776 Stoneridge Mall Rd.
Suite 162
Pleasanton, CA 94588
www.taxwiz.net

CONFIDENTIAL INDIVIDUAL CLIENT QUESTIONNAIRE			
FULL NAME (**Primary Tax Payer)**		SOC SEC #	D.O.B
HOME PHONE	WORK PHONE	MOBILE PHONE:	
EMAIL (1)			
EMPLOYER		OCCUPATION	LENGTH OF EMPLOYMENT
IMPORTANT FRINGE BENEFITS (circle) Pension Plan Health Insurance Life Insurance Cafeteria Plan Other			

FULL NAME (**SPOUSE)**		SOC SEC #	D.O.B
HOME PHONE	WORK PHONE	MOBILE PHONE:	
EMAIL			
EMPLOYER		OCCUPATON	LENGTH OF EMPLOYMENT
IMPORTANT FRINGE BENEFITS (circle) Pension Plan Health Insurance Life Insurance Cafeteria Plan Other			

ADDRESS			
CITY		ST	ZIP
WHO IS YOUR ATTORNEY:			
TAX FILING STATUS (PLEASE CIRCLE) SINGLE MARRIED JOINT MARRIED SEPARATE HEAD OF HOUSEHOLD WIDOW(ER)			

DEPENDENT INFORMATION (Please list children and other dependents)

Name	Relationship	D.0.B	SOC SEC #	Resides with you?