

NEW CLIENT QUESTIONNAIRE

DATE _____

CLIENT & SPOUSE INFORMATION

Client Name _____	
Spouse Name _____	
Business Name (if applicable) _____	
Address _____	City _____ State ____ Zip _____
Home Phone _____	Cell Phone (primary) _____ (secondary) _____
E-Mail address _____	
Social Security # _____	Date of Birth _____
Spouse Social Security # _____	Spouse Date of Birth _____

DEPENDENT INFORMATION

Name _____	SSN _____	DOB _____	Gender _____
Name _____	SSN _____	DOB _____	Gender _____
Name _____	SSN _____	DOB _____	Gender _____
Name _____	SSN _____	DOB _____	Gender _____

GENERAL INFORMATION

What type of return(s) did you file last year? _____ Last year filed? _____
Do you anticipate changes for this upcoming year? _____ Dependents +/- _____
Retirement _____ Job Changes _____ Unemployment _____
Have you ever done Tax Planning ? _____
What are you looking for in a CPA firm? _____
Who prepared your tax return last year? _____
Why are you changing? _____
How did you hear about us? _____
Referral by another client? _____ Client name? _____
Website _____ Google _____ Advertisement _____ Other _____

DO YOU HAVE ANY OF THE FOLLOWING :

W-2's _____ 1099's _____ Interest from bank accounts _____

Dividends _____ IRA _____ Purchased/Sold Stocks/Bonds _____

Rental Real Estate _____ Own / Operate Small Business _____

Own a Partnership, Corporation or LLC _____ Retirement Income _____

Social Security Income _____ Income from gambling/ lottery _____

Do you own or have control over any type of foreign bank accounts? _____

Do you deal in any type of cryptocurrency? _____

Has the Internal Revenue Service ever audited you? _____

Have you received any correspondence from the IRS or State of Kansas in the past year? _____

BUSINESS INFORMATION

Company Name _____

Company Address _____ City _____ State _____ Zip _____

Company Phone _____ Cell Phone _____

EIN / SSN _____

Services Desired

☐ Payroll

☐ Bookkeeping

☐ Tax Prep

☐ Other

BOOKKEEPING / PAYROLL INFORMATION

What type of record keeping do you currently use? _____

QBO _____ QuickBooks (Desktop-Local) _____ QuickBooks (Desktop-Hosted) _____

Quicken _____ Other _____ What version / year _____

Current Payroll Program/Service _____ Other Technology Used _____

How many employees do you have? _____ Payroll Frequency _____

PTO Tracking _____ Bonus / Extra Pay _____ Garnishments _____

401K / IRA Remittance _____ Other _____

Do you currently reconcile your banks accounts monthly? _____ If no, how often? _____

How many monthly transactions / checks do you have? _____