

CLIENT INTAKE FORM

Name: _____

City, State: _____

Telephone Number: _____

Email: _____

Who referred you to us? _____

Who is your tax preparer? _____

I need tax help with:

Internal Revenue Service (IRS)

State

Both

If State or Both, which State? _____

Define tax matter:

Audit

What years _____

Collection

How much is owed (Approximately) _____

Did you file the returns at issue? _____

Name of business? _____

Name(s) of responsible parties/officers for business? _____

Personal Income Tax

Corporate or Partnership income tax

Sales Tax

Trusts and Estates

International

Cryptocurrency

Tax planning

Payroll tax