



Deborah I. Daniel, CPA Charter Accounting
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New Client Information Request

Taxpayer

Spouse

First Name and Middle Initial	_____	_____
Last Name	_____	_____
Social Security Number	_____	_____
Date of Birth	_____	_____
Occupation	_____	_____
Cell Phone Number	_____	_____
Work Number	_____	_____
Home Number	_____	_____
Email	_____	_____
Preferred Contact Method	_____	_____
Address:	_____	_____
	_____	_____
	_____	_____

Dependents

<i>Name (First, Middle Initial, Last)</i>	<i>Social Security Number</i>	<i>Date of Birth</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Optional Info:

Please list contact information for your below listed advisors (Name, Firm, Telephone)

Attorney: _____

Insurance: _____

Pension/Retirement: _____

Banker: _____

New Clients Only:

Why are you seeking a new CPA?

How were you referred to Charter Accounting _____

How frequently would you like to be in contact with your CPA? _____

What are your expectations from your CPA?

Please mark all the primary services you would like Charter Accounting to perform:

- | | | |
|---|---|---|
| <input type="checkbox"/> Individual Tax | <input type="checkbox"/> Payroll | <input type="checkbox"/> Tax Planning |
| <input type="checkbox"/> Business Tax | <input type="checkbox"/> Quarterly Financial Statements | <input type="checkbox"/> Business Entity Choice |
| <input type="checkbox"/> Bookkeeping | <input type="checkbox"/> Year-End Financial Statements | <input type="checkbox"/> QuickBooks Training |
| <input type="checkbox"/> Other: _____ | | |

What to Bring

There are some documents you will want to collect, prior to your appointment, so that we can best serve you. Please take a moment to review the items listed and provide as many documents as available.

Individual Client Documents

Please bring the below documents with you to your appointment:

- Client intake form
- Copies of past 3 years federal and state income tax returns(if new clients only)
- Prior year federal and state depreciation schedules (if new clients only)
- Source documents such as W-2s, 1099s
- Income and expenses to date if scheduled for tax planning appointment
- Copies of any notices received from the Internal Revenue Service or other taxing agencies

For Internal Use:

CPA: _____

Meeting Date: _____

Signed Letter of Engagement: _____