DATE: __________________

PERSONAL CLIENT INFORMATION SHEET

TAXPAYER INFORMATION:

Name: ____ SS#: * _______________________________

DL #: * ___________________ Issue Date: ___________________ Exp. Date: _____________________________

Address: ____ Date of Birth: ___________________________

City, State Zip: ____ Phone (hm): __________________________

Mailing address if different from above: (work) ________________________________

____ (Cell) _________________________________

Email Address: ____

Occupation: ____ Referred by: ____________________________

SPOUSE INFORMATION:

Name: ____ SS#: * _______________________________

DL #: * ___________________ Issue Date: ___________________ Exp. Date: _____________________________

Phone (work) ___________________ (Cell) ____________________ Date of Birth: __________________________

Occupation: ____ Email Address: __________________________

DEPENDENTS:

Name: ____ Date of Birth: ______________________

SS#: * _______________________________________ Relationship: ______________________

Name: ____ Date of Birth: ______________________

SS#: * _______________________________________ Relationship: ______________________

Name: ____ Date of Birth: ______________________

SS#: * _______________________________________ Relationship: ______________________

* Copies required for new clients

Payment is due at the time services are rendered

FOR BUSINESS OWNERS: **SCHEDULE C / SMLLC ONLY**

Name: ____ Federal ID #: ____________________________________

Physical Address: ____

Mailing Address: ____

Phone: (________) _____________________ Fax: (_______) __________________ Year End: ____________

Contact Person: ____

Email Address: ____

*****OVER*****

As a new client with Baity & Assoc., we want to ensure we are providing for all your personal or business needs. Please mark the areas below that you have questions about, or would like information on:

_____ Tax Planning and Consulting

_____ Tax preparation: Individual, Corporate, Partnership, Trust, Estate, Gift, and Non-profit Organizations

_____ IRS Resolution: tax issues between Internal Revenue Service and the taxpayer

_____ State of Texas Resolution: issues between State of Texas and the taxpayer

_____ Notary Public services

_____ Formation of a Business (Inc., LLC or LP – with our Legal Affiliates)

_____ Bookkeeping

_____ QuickBooks™ set up for a business

_____ QuickBooks™ training for staff

_____ QuickBooks™ on-site / in house / remote analysis

_____ Quarterly Payroll Reporting / W-2's & 1099's

_____ Financial Statements

_____ Personal Property Renditions

_____ Dissolution / Termination of a Business