

CLIENT INTAKE FORM

DROP OFF DATE: _____

APPT DATE: _____

STAFF: _____

Office use only

FULL NAME _____

SSN _____ DOB _____

SPOUSE'S NAME _____

If not applicable, write N/A

SSN _____ DOB _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

PHONE # _____

EMAIL _____

*** Email will be our main form of contact. Please make sure your information is correct & current.*

NUMBER OF DEPENDENTS _____

CHANGES FROM LAST YEAR? _____

***Possible changes to mention: martial status, moved, children changes/adoption, checking account, changed jobs, retired, etc.*

DO YOU CURRENTLY HAVE A FINANCIAL ADVISOR? _____ IF SO, WHO? _____

FOR DIRECT DEPOSIT INFORMATION, PLEASE CONFIRM WE HAVE YOUR ACCURATE BANK ROUTING & ACCOUNT #:

ROUTING # _____ ACCOUNT # _____

OTHER _____

QUESTIONS? _____



ACCOUNTING SERVICES
501 W MAIN ST, SUITE A
GLASGOW, KY 42141
270.651.3013

FINANCIAL SERVICES
301 S BROADWAY ST
GLASGOW, KY 42141
270.629.2046

The following is a list of possible documents to include when gathering information for drop-off/appointment:

GENERAL TAXABLE INCOME

_____ W-2 Form(s) for wages, salaries and tips

_____ 1099 Income Statement(s)

BUSINESS INCOME

_____ Business Income and expenses

_____ Rental income and expenses

_____ Farm income and expenses

_____ Form K-1 income from partnerships, trusts and S-Corporations

TAX ESTIMATE PAYMENTS CHECKLIST

_____ Estimated tax payments made with ES Vouchers

	<i>Federal Payments</i>	<i>Date Paid</i>	<i>State Payments</i>	<i>Date Paid</i>
<i>Q1</i>				
<i>Q2</i>				
<i>Q3</i>				
<i>Q4</i>				

ITEMIZED DEDUCTIONS

_____ Medical Expenses

_____ Property and/or vehicle taxes

_____ Home Mortgage interest (Form 1098)

_____ Charitable donations (Cash & Non-Cash)

Cash Amount _____

Non Cash Amount _____

OTHER

_____ IRA Contributions

_____ Student loan interest paid

_____ Child care expenses

_____ Education expenses for you, spouse and/or dependent(s)

_____ Copy of last year's tax return (for new clients only)

***This list is not all-inclusive. If you have questions regarding a particular expense or document, feel free to include said items & we will incorporate if needed.*