



CONNECT. COLLABORATE. CONQUER.

INDIVIDUAL TAX CLIENT SETUP

Taxpayer Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ SSN \_\_\_\_\_

Spouse Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ SSN \_\_\_\_\_

Dependent #1 \_\_\_\_\_ Date of Birth \_\_\_\_\_ SSN \_\_\_\_\_

Dependent #2 \_\_\_\_\_ Date of Birth \_\_\_\_\_ SSN \_\_\_\_\_

Dependent #3 \_\_\_\_\_ Date of Birth \_\_\_\_\_ SSN \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Client Portal Setup:

Taxpayer Email: \_\_\_\_\_ Taxpayer Cell: \_\_\_\_\_

Spouse Email: \_\_\_\_\_ Spouse Cell: \_\_\_\_\_

Preferred Contact Method: \_\_\_\_\_ Email \_\_\_\_\_ Call \_\_\_\_\_

Preferred Documents Delivery: \_\_\_\_\_ Electronic \_\_\_\_\_ Paper \_\_\_\_\_

Referred by: \_\_\_\_\_