



# NEW CLIENT INTAKE

## ◆ INDIVIDUALS ◆

Return file to: \_\_\_\_\_

Need setup by: \_\_\_\_\_

### CONTACT INFORMATION

**Taxpayer Legal Name** \_\_\_\_\_  
**Preferred Name** \_\_\_\_\_

**Primary Address**

Street Address \_\_\_\_\_  
 City, State, Zip \_\_\_\_\_

**Mailing Address** *check for same as primary*

Street Address \_\_\_\_\_  
 City, State, Zip \_\_\_\_\_

**Phone Numbers** (Home) \_\_\_\_\_  
 (Mobile) \_\_\_\_\_

**Email** \_\_\_\_\_

**Spouse Legal Name** \_\_\_\_\_  
**Preferred Name** \_\_\_\_\_

**Primary Address** *check for same as spouse*

Street Address \_\_\_\_\_  
 City, State, Zip \_\_\_\_\_

**Mailing Address** *check for same as primary*

Street Address \_\_\_\_\_  
 City, State, Zip \_\_\_\_\_

**Phone Numbers** (Home) \_\_\_\_\_  
 (Mobile) \_\_\_\_\_

**Email** \_\_\_\_\_

May we send our e-bulletin with CLH updates? Y  N

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### TAX RETURN INFORMATION | DELIVERY PREFERENCES

**Taxpayer**

SSN (###-##-####) \_\_\_\_\_  
 Birthdate (MM/DD/YYYY) \_\_\_\_\_  
 Occupation \_\_\_\_\_  
 State of Residence \_\_\_\_\_  
 Initial Year(s) to Prep \_\_\_\_\_

**Spouse**

SSN (###-##-####) \_\_\_\_\_  
 Birthdate (MM/DD/YYYY) \_\_\_\_\_  
 Occupation \_\_\_\_\_  
 State of Residence \_\_\_\_\_  
 Initial Year(s) to Prep \_\_\_\_\_

**Invoice** Paper  Email  **Filing Status** Single  Married, Filing Jointly  Married, Filing Separately  Head of Household

**Portal** Y  **Form Signing** Paper  E-sign  **Delivery** Pickup  Mail  Deliver  Portal

### DEPENDENTS

Dependent(s) Legal Name(s)	Relationship	SSN #	Birthdate	Year in College	CLH prepare tax return?

### RELATED ENTITIES

Legal Name	Entity Type	Year End (MM / DD) or DOB	Relationship <small>(partner / shareholder / owner / relative)</small>	CLH prep tax return?

### ADDITIONAL CONTACTS & INFO

	Name	Firm	Phone	Email
<b>Financial Adv'r</b>				
<b>Banker</b>				
<b>Attorney</b>				
<b>Bookkeeper</b>				
<b>Payroll Co.</b>				
	Program	Version	Username	Password
<b>Software</b>				