



PO Box 1018, Blue Ridge, GA 30513

706-632-7850

www.Premiercpaservices.com

Prospective Client Questionnaire for Individual

Please complete this questionnaire and email to Jackie@premiercpaservices.com or Fax to 706-632-3925

I want to thank you for sharing your information with me. This information will remain confidential and will be used to see if you are a good fit for our firm. We want to provide the best customer service possible, while helping you achieve your financial goals. I hope to be able to work with you soon. – Jackie Self CPA

Name: _____ DOB: _____

Spouse: _____ DOB: _____

Occupation: _____ Spouse Occupation: _____

Email: _____

Phone (Home): _____ (Mobile) _____ (Work) _____ Mailing

Address: _____

City: _____ State: _____ Zip Code: _____

Do you have any Dependents: Yes / No

What is your Filing Status? _____

Are your income tax filings up to date: Yes / No If No, what was the last year filed? _____

Do you have any of the following (please check all that apply):

<input type="checkbox"/>	W-2 from employer	<input type="checkbox"/>	Interest income
<input type="checkbox"/>	Dividend Income	<input type="checkbox"/>	Social Security Benefits
<input type="checkbox"/>	Unemployment Benefits	<input type="checkbox"/>	Pension and retirement Income
<input type="checkbox"/>	Gambling winnings	<input type="checkbox"/>	1099's from Self -employment
<input type="checkbox"/>	Rental Income	<input type="checkbox"/>	K-1 from a partnership, S Corp or Trust
<input type="checkbox"/>	Capital Gains/Loss from Stocks or Mutual Funds	<input type="checkbox"/>	Farm Income
<input type="checkbox"/>	Exercised and/or Sold and Stock Options		



In the past year, did you pay (please check all that apply):

Mortgage interest	Property Taxes
Charitable Donations (Cash or Non Cash Donations)	Education Expenses or College tuition
DMV or personal taxes (includes RV, Boats, Etc.)	

Do you have (please check all that apply):

Unreimbursed job expenses	Paid Estimated Taxes
IRA, Roth or SEP contributions	Unpaid Taxes
Births, Deaths, Adoptions or Marriage	An office/business in your home
Alimony (Paid or Received)	

Did you encounter any of these situations (please check all that apply):

Move 50 Miles or more for a new job	Buy a home
Sell a home or property	Have a second home or vacation property
Receive a cancellation of debt notice	Did you have a short sale or foreclosure
Work as a classroom teacher	Make any gifts over \$14,000

Do you have Ownership or Investment in any Business or are you a beneficiary of a trust? Yes / No

If yes, Please list:

We specialize in being able to help with delicate situations. Is there any other information we should know that can help us best serve your needs?

How did you hear about Premier CPA Services? (Please be Specific) _____

Would you like to receive the Premier CPA Services News Letter of tax tips? Yes / No