



PO Box 1018, Blue Ridge, GA 30513
706-632-7850 | www.PremierCPAServices.com

Prospective Client Questionnaire for Individual

Please complete this questionnaire and email it to kimberly@premiercpaservices.com or Fax it 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 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) _____

Phone: (Mobile) _____ (Spouse Mobile) _____

Phone: (Work) _____ Ext. _____ (Fax) _____

Address: _____ APT #: _____

City: _____ State: _____ ZIP: _____

Do you have any Dependents?

What is your current Filing Status? _____

Are your income tax filings up to date?: _____ 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"/> | 1099s from self-employment |
| <input type="checkbox"/> | Rental income | <input type="checkbox"/> | K-1 from a partnership or S-Corp |
| <input type="checkbox"/> | Capital Gains/Loss from stocks or mutual funds | <input type="checkbox"/> | Sale of real estate |
| <input type="checkbox"/> | Exercised and/or sold stock options | | |



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

| | | | |
|--------------------------|-----------------------------------------|--------------------------|---------------------------------------|
| <input type="checkbox"/> | Mortgage interest | <input type="checkbox"/> | Property taxes |
| <input type="checkbox"/> | Charitable donations (cash or non-cash) | <input type="checkbox"/> | Education expenses or college tuition |
| <input type="checkbox"/> | DMV or personal taxes (RV, boat, etc.) | | |

Do you have ... (please check all that apply)

| | | | |
|--------------------------|---------------------------------------|--------------------------|---------------------------------|
| <input type="checkbox"/> | Unreimbursed job expenses | <input type="checkbox"/> | Paid estimated taxes |
| <input type="checkbox"/> | IRA, Roth or SEP contributions | <input type="checkbox"/> | Unpaid taxes |
| <input type="checkbox"/> | Births, deaths, adoptions or marriage | <input type="checkbox"/> | An office/business in your home |
| <input type="checkbox"/> | Alimony (paid or received) | | |

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

| | | | |
|--------------------------|---------------------------------------|--------------------------|-----------------------------------------|
| <input type="checkbox"/> | Move 50 miles or more for a new job | <input type="checkbox"/> | Buy a home |
| <input type="checkbox"/> | Sell a home or property | <input type="checkbox"/> | Have a second home or vacation property |
| <input type="checkbox"/> | Receive a cancellation of debt notice | <input type="checkbox"/> | Short sale or foreclosure |
| <input type="checkbox"/> | Work as a classroom teacher | | |

Do you have ownership or investment in any business, or are a beneficiary of any trust?

If yes, please list:

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

What is the subject of your request for an appointment?

How did you hear about Premier CPA Services? (please be specific)

Would you like to receive the Premier CPA Services e-Newsletter of tax tips?

If yes, email address to send newsletter _____