



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](mailto: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:

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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?

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What is the subject of your request for an appointment?

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

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

If yes, email address to send newsletter \_\_\_\_\_