DATE: __________________ **FILE CABINET ID** ________________________

Payment is due at the time services are rendered

PERSONAL INFORMATION

** Copies required for new clients

TAXPAYER INFORMATION:

Name: ____ SS#: ** ____________________________

Driver's License #: **________________ Ex Date: ________ Date of Birth: ________________________

Address: ____

City, State Zip: ____________________________________ Phone (hm): ________________________

(work) ____ (Cell) ____________________________

Email Address: ____

Employer/Job Title: ________________________________ Referred by: ________________________

SPOUSE INFORMATION:

Name: ____ SS#: ** ____________________________

Driver's License #: ** ________________ Exp Date: ________ Date of Birth: ________________________

(work) ____ (Cell) ____________________________

Employer/Job Title: __________________________________ Email Address: ________________________

DEPENDENTS:

Name: ___________________________________ Date of Birth: ____________________
SS#: ___________________________________ Relationship: ____________________

Name: ___________________________________ Date of Birth: ____________________
SS#: ___________________________________ Relationship: ____________________

Name: ___________________________________ Date of Birth: ____________________
SS#: ___________________________________ Relationship: ____________________

FOR BUSINESS OWNERS: SCHEDULE C ONLY

Name: ___________________________________ Federal ID #: ________________________________

Physical Address: ____

Mailing Address: ____

Phone: (________) ____________________ Fax: (_______) ________________ Year End: ______________

Contact Person: ____

Email Address: ____

As a new client with Baity & Assoc., we want to ensure we are providing for all your personal or business needs. Please mark the areas below that you have questions about, or would like information on:

_____ Bookkeeping

_____ Quarterly payroll reporting, W-2's & 1099's

_____ Financial Statements

_____ Tax preparation: Individual, Corporate, Partnership, Trust, Estate, Gift, and Non-profit Organizations

_____ Personal Property Renditions

_____ Tax planning and consulting

_____ Formation of a business (Inc., LLC or LP – with our Legal Affiliates)

_____ Dissolution of a business (Inc., LLC or LP – with our Legal Affiliates)

_____ IRS resolution - tax issues between Internal Revenue Service and the taxpayer

_____ Securities: rollover existing IRA or 401K plans, set up new IRA, Simple or SEP retirement plans, and individual investment plans through mutual funds

_____ Notary public services

_____ QuickBooks™ set up for a business

_____ QuickBooks™ training for staff

_____ QuickBooks™ on-site / in house / remote analysis