



**HARIK THOMPSON**

CPAs and Advisors

## New Client Intake Form

### Client Information

Full Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number(s): \_\_\_\_\_ Email: \_\_\_\_\_

### Spouse/Partner Information (if applicable)

Full Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number(s): \_\_\_\_\_ Email: \_\_\_\_\_

### Business Information (if applicable)

Business Name: \_\_\_\_\_

Business Address: \_\_\_\_\_

Business Phone Number: \_\_\_\_\_ Business Email: \_\_\_\_\_

Business Structure (e.g., Sole Proprietorship, LLC, Corporation): \_\_\_\_\_

### Tax Information

Filing Status

Single     Married filing jointly     Married filing separately     Head of household     Qualifying widow(er) with dependent child

Number of Dependents: \_\_\_\_\_

Is there any other important tax-related information we should know about?

\_\_\_\_\_

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**Financial Information**

Annual Income (Estimated): \$ \_\_\_\_\_ Sources of Income: \_\_\_\_\_

Do you have any rental income or investment income?  Yes  No

If yes, please specify: \_\_\_\_\_

Do you have any foreign financial accounts or assets?  Yes  No

If yes, please provide details: \_\_\_\_\_

Do you have any outstanding tax liabilities or tax issues?  Yes  No

If yes, please provide details: \_\_\_\_\_

**Previous Tax Preparer** (if applicable)

Name of Previous Tax Preparer: \_\_\_\_\_

Contact Information: \_\_\_\_\_

**Accounting and Financial Services Needed**

Please check the services you require

Tax Planning and Preparation

Bookkeeping

Financial Statements

Payroll Services

Business Consulting

Retirement Planning

Estate Planning

Other (please specify): \_\_\_\_\_

**Additional Comments or Special Instructions:**

\_\_\_\_\_

How did you find Harik Thompson, CPAs? \_\_\_\_\_

*We look forward to assisting you with your tax and financial needs. Please return this form along with any supporting documents to our office at your earliest convenience by fax or mail, or contact us for a secure upload link. Thank you!*

