



1140 N Lincoln Street, Greensburg, IN 47240
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www.bohmancpagroup.com

New Client Information Request

Taxpayer

Spouse

Legal First & Middle Initial	_____	_____
Last Name	_____	_____
Preferred Name (if different)	_____	_____
Social Security Number	_____	_____
Date of Birth	_____	_____
Occupation	_____	_____
County of Residence as of Jan 1	_____	_____
County of Employment as of Jan 1	_____	_____
Cell Phone Number	_____	_____
Work Number	_____	_____
Home Number	_____	_____
Email	_____	_____
Preferred Contact Method	_____	_____
Address:	_____	_____
	_____	_____
	_____	_____

Married: Date of Marriage _____ Divorced Widowed Single

Children

	<i>Name (First, Middle Initial, Last)</i>	<i>Social Security Number</i>	<i>Date of Birth</i>	<i>Relationship</i>
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____
4.	_____	_____	_____	_____
5.	_____	_____	_____	_____

Other Dependents

	<i>Name (First, Middle Initial, Last)</i>	<i>Social Security Number</i>	<i>Date of Birth</i>	<i>Relationship</i>
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____

Professional Advisors

Please list contact information for your below listed advisors (Name, Firm, Telephone)

Attorney: _____
Insurance: _____
Financial Advisor: _____
Banker: _____
Current Accountant: _____

Expectations of your CPA

Why are you seeking a new CPA?

How were you referred to Bohman CPA Group? _____

How frequently would you like to be in contact with your CPA? _____

What are your expectations from your CPA?

Please mark all the primary services you would like Bohman CPA Group to perform:

- | | | |
|---|---|---|
| <input type="checkbox"/> Individual Tax | <input type="checkbox"/> Payroll | <input type="checkbox"/> Tax Planning |
| <input type="checkbox"/> Business Tax | <input type="checkbox"/> Quarterly Financial Statements | <input type="checkbox"/> Business Entity Choice |
| <input type="checkbox"/> Bookkeeping | <input type="checkbox"/> Year-End Financial Statements | <input type="checkbox"/> QuickBooks Training |
| <input type="checkbox"/> Other: _____ | | |

What to Bring

There are some documents you will want to collect, prior to your appointment, so that we can best serve you. Please take a moment to review the items listed and provide as many documents as available.

Individual Client Documents

Please bring the below documents with you to your appointment:

- Client intake form
- Copies of past 3 years federal and state income tax returns
- Prior year federal and state depreciation schedules (if applicable)
- Source documents such as W-2s, 1099s
- Income and expenses to date if scheduled for tax planning appointment
- Copies of any notices received from the Internal Revenue Service or other taxing agencies
- Copy of driver's license taxpayer & spouse

For Internal Use:

CPA: _____

Meeting Date: _____

Signed Letter of Engagement: _____