BOHMAN C.P.A. GROUP, LLC

1140 N Lincoln Street, Greensburg, IN 47240
Phone (812) 222-3035   Fax (812) 222-3037
www.bohmancpagroup.com

New Client Information Request

	Taxpayer	**Spouse**
First Name and Middle Initial	______________________	______________________
Last Name	______________________	______________________
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:	______________________	______________________
	______________________	______________________
	______________________	______________________

Tax Filing Status:

☐ Single ☐ Married ☐ Married Filing Separate ☐ Head of Household

Dependents

Name (First, Middle Initial, Last) *Social Security Number* *Date of Birth*

1. ____
2. ____
3. ____
4. ____
5. ____

Professional Advisors

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

Attorney: ____

Insurance: ____

Pension/Retirement: ____

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?

____

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____

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

- ☐ Individual Tax
- ☐ Payroll
- ☐ Tax Planning
- ☐ Business Tax
- ☐ Quarterly Financial Statements
- ☐ Business Entity Choice
- ☐ Bookkeeping
- ☐ Year-End Financial Statements
- ☐ QuickBooks Training
- ☐ 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

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For Internal Use:

CPA: ___________________________________

Meeting Date: ____________________________________

Signed Letter of Engagement: ________________________