



Palmer, Brady & Company^{PLLC}

Certified Public Accountants & Consultants INDIVIDUAL NEW CLIENT WORKSHEET

Primary Tax Payer First

Name

Middle Name

Last Name

Date of Birth

Social Security Number

Physical Address

City

State

Zip Code

Mailing Address

City

State

Zip Code

Home Number

Mobile Number

Primary Email

Secondary Email

Spouse

First Name

Middle Name

Last Name

Date of Birth

Social Security Number

Home Number

Mobile Number

Email

Dependent Child Name

Male/Female

Social Security Number

DOB

Dependent Child Name

Male/Female

Social Security Number

DOB

Dependent Child Name

Male/Female

Social Security Number

DOB



Palmer, Brady & Company_{PLLC}

Certified Public Accountants & Consultants

Dependent Child Name Male/Female Social Security Number DOB

Dependent Child Name Male/Female Social Security Number DOB

How did you learn about us?

Reason for Choosing us?

Reason for your visit today?

Tax Preparation:
Estate & Gift Planning
Taxes for Multiple Years

Consulting
Payroll
Bookkeeping

Tax Notice: (Please specify)

Other: Please specify

What to bring to your initial appointment:

Wages & Income (W-2, 1099's, K-1)
Interest & Dividends (Support 1099's)
Pensions & Annuities (1099-R)
Education Tuition & Fees (1098-T)
Itemized Deductions (Contributions,
1098 Mortgage Statements, Own Tax,
Medical Expenses, Receipts.)

Health Insurance
Child/Dep. Care
Business/Farm Income Expenses
Estimated Taxes & Payments
Sale of Personal Residence