

Kollath|CPA

INDIVIDUAL CLIENT INTAKE FORM

(Check box below to identify preferred contact.)

Name: _____
 (First) (Middle) (Last) (SSN) (DOB)

Spouse: _____
 (First) (Middle) (Last) (SSN) (DOB)

Address: _____
 (Street/PO Box) (City) (State) (Zip Code)

Dependent: _____
 (First) (Middle) (Last) (SSN) (DOB)

Dependent: _____
 (First) (Middle) (Last) (SSN) (DOB)

Dependent: _____
 (First) (Middle) (Last) (SSN) (DOB)

Dependent: _____
 (First) (Middle) (Last) (SSN) (DOB)

Business Name (if applicable): _____ EIN: _____

(Check box below to identify preferred contact.)

Taxpayer Phone: _____ Home Cell Work

Spouse Phone: _____ Home Cell Work

Other Phone: _____ Home Cell Work

Taxpayer Email: _____

Spouse Email: _____

FOR INTERNAL USE ONLY - PLEASE DO NOT ENTER INFORMATION BELOW

New Client Returning Client Client ID: _____ Office: _____

Partner _____ Manager _____ Associate _____

Engagement: NONRECUR ACCTRECUR ADVISORY INSCONSULT

PAYROLL TAX/TP/TAXOTHER HR

Tax: Return Type: _____ Tax Year: _____

Other Notes: _____

Please email completed form to efile@kollathcpa.com or provide to your tax preparer.