



Donovan CPAs

New Client Information Individual 1040

Base rate for an individual tax return is \$400

*Date _____

Referred by _____

Personal Information:

*Filing status: Single ___ Married Filing Joint ___ Married Filing Separately ___ Head of Household ___

*Name: _____

*SSN: _____ *DOB: _____

*Email: _____

Name (Spouse): _____

SSN: _____ DOB: _____

Spouse email: _____

*Address: _____

*State/City/ZIP: _____

*Home Phone: _____ Cell Phone: _____

Spouse Home Phone: _____ Cell Phone: _____

Fax #: _____

Employment:

Are you a full time Farmer? Yes _____ No _____

Occupation: _____ Phone: _____

County: _____

Spouse occupation: _____ Phone: _____

County: _____

(over)

Dependents:

Name: _____ DOB: _____ SSN: _____
Name: _____ DOB: _____ SSN: _____
Name: _____ DOB: _____ SSN: _____
Name: _____ DOB: _____ SSN: _____
Name: _____ DOB: _____ SSN: _____
Name: _____ DOB: _____ SSN: _____
Name: _____ DOB: _____ SSN: _____
Name: _____ DOB: _____ SSN: _____
Name: _____ DOB: _____ SSN: _____

Do you own or rent your home? _____
Did you make federal and/or state estimate payments? _____
Do you have multiple state returns to file? If so which state? _____

Do you have multiple returns to be processed? If so, please list: _____

Electronic Enhancements

You may now send/receive your tax documents securely through our Client Portal as well as receive text message notifications when your tax return is ready to be picked up.

*Would you like to sign up for the Secure Client Portal? Yes _____ No _____

Email used for the portal _____

*Would you like to receive Text message Notifications? Yes _____ No _____

Cell Phone # _____

Spouse Cell Phone # _____