



# Donovan CPAs

## New Client Information Individual 1040

\*Base rate for an individual tax return is \$500\*

\*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 # \_\_\_\_\_