



Donovan CPAs

Internal use only
Completed by:

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: _____

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: _____

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

Cell Phone # _____ - _____ - _____

Spouse Cell Phone # _____ - _____ - _____

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Primary Contact: _____

Billing Manager: _____

Preparer: _____ ("P" for basic 1040s pool or preparer name)

Reviewer: _____ (Reviewer name or "P" for reviewer pool)

Is this a retail 1040 client? Yes _____ No _____

Is this a family return? Yes _____ No _____

Bill together? Yes _____ No _____

If yes, list of related returns: _____

Difficulty Level: Basic _____ Moderate _____ Advanced _____ Farmer _____ Minister _____