HAGEN·CPA LLC

NEW ESTATE/TRUST CLIENT – *INTAKE FORM*

4525 Woodgate Drive
Janesville, WI 53546

○ JANESVILLE, WI OR EVANSVILLE, WI ○

1 North Madison Street
Evansville, WI 53536

APPOINTMENT DATE & TIME: ______________________ **WITH:** ______________________

CONTACT PERSON INFORMATION:

NAME *(LAST, FIRST)*: ______________________

PHONE NUMBER: ______________________

EMAIL: ______________________

ADDRESS: ______________________

CITY, STATE, ZIP: ______________________

BENEFICIARY INFORMATION:

NAME *(LAST, FIRST)*: ______________________

SSN: ____________ SHARE: *0%*

ADDRESS: ______________________

CITY, STATE, ZIP: ______________________

NAME *(LAST, FIRST)*: ______________________

SSN: ____________ SHARE: *0%*

ADDRESS: ______________________

CITY, STATE, ZIP: ______________________

NAME *(LAST, FIRST)*: ______________________

SSN: ____________ SHARE: *0%*

ADDRESS: ______________________

CITY, STATE, ZIP: ______________________

NAME *(LAST, FIRST)*: ______________________

SSN: ____________ SHARE: *0%*

ADDRESS: ______________________

CITY, STATE, ZIP: ______________________

PREFERRED METHOD TO SIGN TAX RETURN:

E-SIGN ◉ AT JVL OFFICE ○ AT EVL OFFICE ○

COMPLETED TAX RETURN DELIVERY METHOD:

MAILED TO YOU ○ PORTAL UPLOAD ○

PICK-UP AT JVL OFFICE ○ PICK-UP AT EVL OFFICE ○

ESTATE/TRUST INFORMATION:

ESTATE/TRUST NAME: ______________________

ADDRESS: ______________________

CITY, STATE, ZIP: ______________________

FEIN & DATE CREATED: ______________________

TRUST TYPE:

- ☐ IRREVOCABLE TRUST
- ☐ REVOCABLE LIVING TRUST
- ☐ CHARITABLE TRUST
- ☐ SPECIAL NEEDS TRUST
- ☐ OTHER: ______________________

QUESTIONS:

1. YEAR LAST RETURN WAS FILED: ____________
2. INCOME REQUIRED TO BE DISTRIBUTED DURING THE YEAR: $ ____________
3. OTHER AMOUNTS PAID, CREDITED, OR OTHERWISE REQUIRED TO BE DISTRIBUTED: $ ____________
4. DID THE ESTATE/TRUST RECEIVE TAX-EXEMPT INCOME? IF YES, ENTER AMOUNT: $ ____________
5. DID THE ESTATE/TRUST RECEIVE INCOME FROM:
   - ☐ ALL/PART OF A PERSON'S EARNINGS
   - ☐ SELF-EMPLOYED SMALL BUSINESS
   - ☐ RENTAL REAL ESTATE
   - ☐ PARTNERSHIP, CORPORATION, TRUST, OR ESTATE?
   - ☐ INSTALLMENT SALE
   - ☐ SALE OF STOCKS OR BONDS
   - ☐ INTEREST OR DIVIDENDS
6. DID THE ESTATE/TRUST RECEIVE OR PAY SELLER-FINANCED MORTGAGE?
7. DID THE ESTATE/TRUST SELL PROPERTY?

HOW DID YOU HEAR ABOUT US?

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REASON FOR APPOINTMENT:

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For Office use only

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Request that the client **send or drop off the prior year tax return before their appointment.*

**For New Tax Clients: Once the completed Intake Form is received, set the client up, then send a to-do to Terri to set up a project, and then send a $100 non-refundable retainer invoice to client; Once retainer is paid, contact client to schedule a 1.5-hour appointment with staff member assigned to see new clients.*

OFFICE TASKS:

(date & initial each step completed)

SETUP IN OFFICETOOLS: ___________________________

SETUP IN DRAKE: ___________________________

SETUP IN SORABAN: ___________________________

SETUP IN PORTALS: ___________________________

BLUE FOLDER: ___________________________

PROJECT STARTED: ___________________________

QUICKBOOKS: ___________________________

NOTES:

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