



NEW INDIVIDUAL 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: _____

FILING STATUS: SINGLE MARRIED – JOINTLY MARRIED – SEPARATELY

PRIMARY TAXPAYER INFORMATION:

NAME (LAST, FIRST MI): _____

PHONE NUMBER: _____

E-MAIL: _____

SSN: _____

DOB (MM/DD/YYYY): _____

DOD (MM/DD/YYYY): _____

OCCUPATION: _____

ADDRESS: _____

CITY, STATE, ZIP: _____

DRIVER'S LICENSE (WILL NEED PHOTOCOPY):

STATE & NUMBER: _____

ISSUED (MM/DD/YYYY): _____

EXPIRES (MM/DD/YYYY): _____

DEPENDENT INFORMATION:

NAME (LAST, FIRST MI): _____

SSN: _____

DOB (MM/DD/YYYY): _____

NAME (LAST, FIRST): _____

SSN: _____

DOB (MM/DD/YYYY): _____

NAME (LAST, FIRST): _____

SSN: _____

DOB (MM/DD/YYYY): _____

PREFERRED METHOD TO SIGN TAX RETURN:

E-SIGN AT JVL OFFICE AT EVL OFFICE

COMPLETED TAX RETURN DELIVERY METHOD:

MAILED TO YOU PAPER COPY - EVL OFFICE
PAPER COPY - JVL OFFICE PORTAL UPLOAD

SPOUSE INFORMATION:

NAME (LAST, FIRST MI): _____

PHONE NUMBER: _____

E-MAIL: _____

SSN: _____

DOB (MM/DD/YYYY): _____

DOD (MM/DD/YYYY): _____

OCCUPATION: _____

ADDRESS: _____

CITY, STATE, ZIP: _____

DRIVER'S LICENSE (WILL NEED PHOTOCOPY):

STATE & NUMBER: _____

ISSUED (MM/DD/YYYY): _____

EXPIRES (MM/DD/YYYY): _____

ADDITIONAL INFORMATION:

COMPLETED CHECKLIST? YES No

OWN A BUSINESS? YES No

IF YES:

BUSINESS NAME: _____

BUSINESS FEIN: _____

****FILL OUT BUSINESS INTAKE FORM, IF APPLICABLE****

HOW DID YOU HEAR ABOUT US?

REASON FOR APPOINTMENT:

FOR OFFICE USE ONLY

**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 OFFICE TOOLS: _____

SETUP IN DRAKE: _____

SETUP IN SORABAN: _____

SETUP IN PORTALS: _____

BLUE FOLDER: _____

PROJECT STARTED: _____

QUICKBOOKS: _____

NOTES:
