



200 Stonewall Blvd, Suite 6B, Wrentham, MA 02093  
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[www.sdbaccounting.com](http://www.sdbaccounting.com)

## **New Client Intake Form**

Main Contact: ☐ Taxpayer ☐ Spouse

Filing Status: ☐ Single ☐ Head of Household  
☐ Married Filing Joint ☐ Widow  
☐ Married Filing Separate

Tax Info: ☐ Schedule C (self-employed) Bus Name: \_\_\_\_\_  
☐ Schedule E (rental prop.) ☐ LLC (1 member)

### **Taxpayer**

### **Spouse**

|             |  |  |
|-------------|--|--|
| First Name: |  |  |
| Last Name:  |  |  |
| E-mail:     |  |  |
| Cell Phone: |  |  |
| Address:    |  |  |

|                     |                    | <u>Rate</u> | <u>Minimum</u> |                              |                             |
|---------------------|--------------------|-------------|----------------|------------------------------|-----------------------------|
| I am interested in: | Personal Tax Prep. | \$270 hr    | \$ 460         | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|                     | Entity Tax Prep.   | \$270 hr    | \$1,265        | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|                     | Trust/Estate       | \$270 hr    | \$ 500         | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|                     | Bookkeeping        | \$135 hr    | Varies         | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

I would like to be invited to your secure portal, SmartVault. ☐ Yes ☐ No

I plan on dropping off my tax documents (no appointment necessary) or mailing them. SDB has a 24 hr. secure drop slot. ☐ Yes ☐ No

I plan on scheduling an appointment (optional) with Sam Blackmore: ☐ Yes ☐ No

[https://calendly.com/sdbaccounting\\_sam/appointment](https://calendly.com/sdbaccounting_sam/appointment)

Please provide any additional information pertinent to your tax situation:

Whom may we thank for this referral?