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New Client Questionnaire

DL #	Today's Date:				
Nickname	Your Full Name		Spouse Full Name		
SS # Birthdate SS # Birthdate DL # DL Iss Date DL # DL Iss Date DL # DL Iss Date DL Expiration Date DL Expiration Date Occupation Occupation Occupation Demployer Employer Employer Employer Employer Ocell Phone Work Phone Address Email Email Email Dependent Name Birthdate					
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Home Phone					
Address					
Resident City or Township Resident County Resident School District	Home Phone				
Dependent Name	Address			Zip Code	
Dependent Name Birthdate Dependent Name Birthdate What type of help do you need (circle all that apply)? Tax / Accounting / Financial Planning / Business Coaching / Other How did you hear about the CPA Advisory Group?	Resident City or Township	Resident County	Resident S	School District	
What type of help do you need (circle all that apply)? Tax / Accounting / Financial Planning / Business Coaching / Other How did you hear about the CPA Advisory Group? Would you like to receive the CPA Advisory Group newsletter of tax tips? Yes No Business Information (Only complete if you are a business owner) Business Name	Dependent Name	Birthdate	Dependent Name	Birthdate	
What type of help do you need (circle all that apply)? Tax / Accounting / Financial Planning / Business Coaching / Other How did you hear about the CPA Advisory Group? Would you like to receive the CPA Advisory Group newsletter of tax tips? Yes No Business Information (Only complete if you are a business owner) Business Name	Dependent Name	Birthdate	Dependent Name	Birthdate	
Business Name Nature of Business Business Type (circle one) C Corp S Corp Multi Member LLC Single Member LLC EIN Physical Address Zip Code Business Phone # Business email Software Number of Employees Number of Owners Business website For Administrative Use Only: Onboarding Team Member Return File to: Client Code Tax Season Appointment Date or Mail in Date Created Investment Quoted					
Business Type (circle one) C Corp S Corp Multi Member LLC Single Member LLC EIN Physical Address		-	·		
Physical Address Zip Code Business Phone # Business email Software Number of Employees Number of Owners Business website For Administrative Use Only: Onboarding Team Member Return File to: Client Code Tax Season Appointment Date or Mail in Date Created Investment Quoted					
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