



NEW INDIVIDUAL CLIENT - INTAKE FORM

4525 Woodgate Drive
Janesville, WI 53546
(608) 754-8525

JANESVILLE, WI OR EVANSVILLE, WI

1 North Madison Street
Evansville, WI 53536
(608) 882-2795

APPOINTMENT DATE & TIME: _____ WITH: _____

FILING STATUS: SINGLE MARRIED – JOINTLY MARRIED – SEPARATELY

PRIMARY TAXPAYER INFORMATION:

NAME (LAST, FIRST): _____

PHONE NUMBER: _____

E-MAIL: _____

SSN: _____

DOB (MM/DD/YYYY): _____

DOD (MM/DD/YYYY): _____

OCCUPATION: _____

ADDRESS: _____

CITY, STATE, ZIP: _____

DRIVER'S LICENSE (SCAN):

NUMBER: _____

ISSUED (MM/DD/YYYY): _____

EXPIRES (MM/DD/YYYY): _____

DEPENDENT INFORMATION:

NAME (LAST, FIRST): _____

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): _____

PHONE NUMBER: _____

E-MAIL: _____

SSN: _____

DOB (MM/DD/YYYY): _____

DOD (MM/DD/YYYY): _____

OCCUPATION: _____

ADDRESS: _____

CITY, STATE, ZIP: _____

DRIVER'S LICENSE (SCAN):

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

OFFICE TASKS:

(date & initial each step completed)

SETUP IN OFFICE TOOLS: _____

SETUP IN DRAKE: _____

SETUP IN PORTALS: _____

BLUE FOLDER: _____

PROJECT STARTED: _____

QUICKBOOKS: _____

DATE: _____

- *Request that the client **send or drop off Prior Year Tax Returns** (3 recommended) before their appointment.*
- *Do not schedule appointments until we have received all the information.*
- *Allow at least 3 weeks to review and prepare before scheduling.*
- *Inform the client that they will receive a Tax Organizer via a Secure Portal*

NOTES:
