



## 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 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

\*\*\*\*\*

**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: \_\_\_\_\_

*\*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.*

**NOTES:**

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