



PROCTOR & ASSOCS.
TAX • ACCOUNTING • PAYROLL

New Client Interview Sheet

We thank you for your trust in us to provide you with the best possible tax preparation at the most affordable price. In order for us to accurately file your income tax return, we will need the following information. The information that you provide to us will remain **confidential**. We value your privacy and we promise not to violate that trust.

CLIENT INFORMATION

Taxpayer Full Name: _____

SSN Number _____ DOB _____

Spouse Full Name: _____

SSN Number _____ DOB _____

Address: _____ Apt: _____

City: _____ State: _____ Zip _____

Home Phone: _____ Cell Phone: _____

Taxpayer Occupation: _____ Spouse Occupation: _____

E-mail: _____

(Your E-mail address WILL NOT be given or sold to anyone else)

DEPENDENTS

Can you be claimed as a dependent on someone else's tax return? Yes ____ No ____

Please list all dependents you are claiming from the oldest to the youngest.

Name **Date of Birth** **SSN** **Relationship**

INCOME/DEDUCTIONS

Please answer each question with a Yes or No.

- Do you have any W2's? Yes ___ No ___
- Do you have any 1099's? Yes ___ No ___
- Do you have any interest from bank accounts? Yes ___ No ___
- Do you have any dividend income? Yes ___ No ___
- Have you sold or purchased stocks or bonds? Yes ___ No ___
- Do you have any unemployment compensation? Yes ___ No ___
- Do you have any retirement income? Yes ___ No ___
- Do you have any social security income? Yes ___ No ___
- Did you receive a state tax refund last year? Yes ___ No ___
- Do you have an IRA? Yes ___ No ___
- Does your spouse have an IRA? Yes ___ No ___
- Have you or your spouse contributed to an IRA? Yes ___ No ___
- Do you have any out of pocket medical expenses? Yes ___ No ___
- Do you have a mortgage interest statement? Yes ___ No ___
- Do you have any personal property tax expenses? Yes ___ No ___
- Do you have any charitable contributions? Yes ___ No ___
- Do you have any tuition expenses? Yes ___ No ___
- Do you have any student loan interest? Yes ___ No ___
- Do you have any childcare expenses? Yes ___ No ___
- Do you have any moving expenses? Yes ___ No ___
- Have you ever been denied Earned Income Credit? Yes ___ No ___
- Did you receive \$7500 1st Time HB credit in 2008? Yes ___ No ___
- Do you own any rental real estate? Yes ___ No ___
- Do you own or operate a small business? Yes ___ No ___

(active duty military only)

Direct Deposit Information: *(if expecting refund)*

ACH/Routing _____ Account Number _____

Checking Savings

Who prepared last year's taxes for you?

Self Chain Firm (JH, HRB, LT) Indep. Firm My Homeboy/girl

How did hear about us?

Friend/Fam* Social Media Postcard/Flyer Google/TT Radio Other

**Name of person that offered to better your tax experience?*

THANK YOU!

<i>PATBS Staff:</i>	
Copy of ID(s) _____	
Copy of SS(s) _____	
PY Return _____	
Date Rec'd: _____	