



**Client Information**

New  Update

*Thank you for coming to PETWAY MILLS & PEARSON. We are honored to assist you in your financial matters. Please provide the following information so that we can best support your goals and objectives.*

**TAXPAYER INFORMATION**

**SPOUSE INFORMATION**

First Name and Initial \_\_\_\_\_  
 Last Name: \_\_\_\_\_  
 Social Security # \_\_\_\_\_  
 Date of Birth \_\_\_\_\_  
 Occupation \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Filing Status: (please circle)    Single    Married Filing Joint    Married Filing Separate    Head of Household

DEPENDENTS: FULL NAME	RELATIONSHIP	DATE OF BIRTH	S. S. NUMBER

**CONTACT INFORMATION**

Street Address \_\_\_\_\_ Mailing Address \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_ Spouse Cell: \_\_\_\_\_  
 Email: \_\_\_\_\_ Spouse Email: \_\_\_\_\_  
 Who is the primary contact? \_\_\_\_\_

**WHAT BROUGHT YOU TO US?**

- Website                       Just saw the building                       Community Event
- Newspaper                       Phone book                       Someone Who? \_\_\_\_\_

CORPORATE OR ESTATE INFORMATION MAY BE ENTERED ON THE BACK OF THIS PAGE

*Our professional fees will be billed at our standard rates which range from \$50 to \$250 per hour, depending on the level of personnel assigned. There is no charge for your initial consultation. Payment is expected upon completion of work.*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

<p><b>OFFICE USE:</b></p> <p>PREPARER</p> <p><input type="checkbox"/> Individual 1040                      <input type="checkbox"/> Estate 1041</p> <p><input type="checkbox"/> Corp. (S-Corp)1120-S                      <input type="checkbox"/> Partnership 1065</p> <p><input type="checkbox"/> Corp. (C-Corp)1120                      <input type="checkbox"/> _____</p> <p>ADMIN.</p> <p>Client No. _____</p>	<p><b>NOTES:</b></p>     
--	--

**ESTATE INFO** (For Estate Returns Only)

Name: \_\_\_\_\_

S. S. # \_\_\_\_\_

**CORPORATE INFO** (For Corp. Returns Only)

Company name: \_\_\_\_\_

EIN: \_\_\_\_\_

Year End: \_\_\_\_\_