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 Licensed to Represent Taxpayers Before the IRS

Member: Illinois Society of Enrolled Agents
 National Association of Enrolled Agents

NEW CLIENT APPOINTMENT DATA WORKSHEET

2018 TAX RETURNS

Client Names	First Name	Middle Initial	Last Name	Suffix
Your Name:				
Spouse's Name:				

Client's Phone (daytime):		Client's Phone (evening):	
Spouse's Phone (daytime):		Spouse's Phone (evening):	

Client's email:	
Spouse's email:	

TAX TRANSACTIONS

During 2018:	YES	NO
Did you sell a residence?		
Did you move from another state? State: _____		
Did you own rental property?		
Did you sell rental property?		
Were you or your spouse self-employed?		
Did you own any limited partnership interests?		
*If yes, how many?		
Did you use an automobile for business other than to go to and from work?		
Did you sell stocks, bonds or mutual funds?		
*If yes, how many transactions?		
Did you refinance and pay points during 2018?		
Are you bringing in other family members' returns to be done such as children or parents?		
How did you hear about us?		
Additional information you would like to include:		

Appointment Preference

Date	Day (M-W-F-Sa)	Morning	Afternoon	Evening	Preference
		:	:	:	1 st Choice
		:	:	:	2 nd Choice
		:	:	:	3 rd Choice