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Note: Save this blank form, complete the information, save the form again, and email the completed form as an attachment to newclient@map-cpas.com

NEW CLIENT APPLICATION - INDIVIDUAL

PRELIMINARY INFORMATION

Contact Name: _____ Best Contact Phone #: _____

Alternate phone # _____ Fax: _____

Preferred Email: _____ Alternate optional email: _____

Alternate Contact Name: _____ Best Contact Phone #: _____

Preferred Email: _____ Alternate optional email: _____

Home Address: _____

City: _____ State _____ Zip _____

Business Address: _____

City: _____ State _____ Zip _____

Check preferred mailing address: Home _____, Business _____, Other _____

Individual tax clients: Please list taxpayers' and dependents' names and dates of birth:

Name of Taxpayer or Dependent	Date of Birth
1.	
2.	
3.	
4.	
5.	

If you are divorced, do you claim your dependents every year? Yes _____, No _____, N/A _____

Claim on odd / even years? Odd ____, Even ____, N/A ____, Other arrangements? _____

Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?
Have you ever lived/worked abroad? If so, when? _____

Who referred you, or how did you hear of Mangold Anker Phillips? _____

Who prepared your tax return last year? _____

What objectives do you want to accomplish in the initial interview appointment?

What long-term objectives do you want to achieve in working with Mangold Anker Phillips?



What are your expectations of your accountant /advisor? Do you want to be contacted periodically throughout the year? _____

What is your preferred method of communication? (telephone / email / meet in person / mailings) _____

What response time do you expect in accounting and tax questions? _____

Generally, we extend individual tax returns in which we do not receive all the information by March 1. Are you OK with extending your tax return, if necessary? Yes _____, No _____, N/A _____

Please list the most important service issues. _____

OTHER ADVISORS

Who is your financial planner or stock broker? _____

Do we have your permission to talk to them, if necessary, to request additional information? _____

Do you have a current will? _____ (Can we get a copy?) _____

Have you established an estate plan? _____

Do you have a trust? _____ (Can we get a copy of the last filed return?) _____

Who is your attorney? _____

Do you need recommendations of an attorney or financial advisor? _____

CURRENT ACCOUNTING / CONSULTING RELATIONSHIP

Do you have a current Accountant / Accounting firm? _____

If so, why are you considering changing CPA firms? _____

Have you informed your current accountant that you are meeting with us? _____

Name of Current Accounting Firm _____

Address _____

Telephone _____ E-Mail Address _____

What DO you like about working with your current accountant? _____

What DON'T you like about working with your current Accountant? _____

Please provide us with the last 3 years of federal and state tax returns. We request a 50% retainer from new clients.