

NEW CLIENT WORKSHEET

**PLEASE ATTACH A COPY OF BOTH TAXPAYER AND SPOUSE
DRIVERS LICENSE OR STATE ID**

Taxpayer

Spouse

Name:	Name:
Birthday:	Birthday:
Soc.Sec #	Soc.Sec #
Job Title:	Job Title:
Email:	Email:
Phone #	Phone #
Filing Status: <input type="radio"/> Single <input type="radio"/> Married Joint <input type="radio"/> Married Separate <input type="radio"/> Head of Household	

Is it ok to TEXT?

Address

WISCONSIN RENTERS ONLY

Rent Paid: Was Heat Included in the rent?

Dependents: ** IF YOU HAVE A DEPENDENT BORN IN 2025 AND LATER, WOULD YOU LIKE US TO SUBMIT FORM 4547 TO OPEN THE "TRUMP ACCOUNT"

Dependents (please attach additional pages if needed)

Name	Social Security #	Birthday	Relationship	College Student
				Yes No

Bank Account Direct Deposit Information

- Did you have marketplace insurance?
 - Please provide form 1095-A
- Did you receive overtime/tips?
 - Please provide last pay-stub
- Did you sell or trade any virtual currency?
 - Please provide us the 1099B form for all sales and trades
- Did you receive unemployment benefits?
 - Please provide form 1099-G
- Did you or your child attend college?
 - Please provide us form 1098-T for each student

Additional Information