

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: Single Married Joint Married Separate 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
				Yes	No
				Yes	No
				Yes	No

Bank Account Direct Deposit Information

Bank Name Routing Number Account Number Checking/Saving

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- ## Additional Information