

Heath, Fania & Co., PC

New Client Data – Individual*

Client ID: _____

Name: _____ Social Security #: _____

Date of Birth: _____ Occupation: _____

Spouse's Name: _____ Social Security # _____

Date of Birth: _____ Occupation: _____

Mailing Address: _____

Telephone (home) _____ (work) _____ (cell) _____

Email Address: _____ **County:** _____

Please list all dependents information (use back for more than 3):

Name _____ Relationship _____ SS# _____ DOB _____

Name _____ Relationship _____ SS# _____ DOB _____

Name _____ Relationship _____ SS# _____ DOB _____

Descriptions of Services Desired: (check all that apply)

- Tax Preparation and Planning
- Personal Consulting Services
- Accounts Payable
- Litigation Support
- Conservatorship

Other issues to be addressed: _____

Are you or your spouse self-employed? If so, please complete the New Client Data Business Form.

Who referred you to us? _____

Prior Accountant: _____ Attorney: _____

Banker: _____

Date: _____

(Signature)

FOR OFFICE USE ONLY:

New Client Setup:

Practice CS File Cabinet Ultra Tax New Client Listing for Year Engagement Letter Constant Contact

Documents Needed: Prior Year Tax Return Social Security Card Driver's License

*Our firm conducts perfunctory background investigations on prospective and current clients. We reserve the right to refuse a prospective client – or disengage a current client – based on select nondiscriminatory factors, including, but not limited to, their being subject to an ongoing investigation of fraudulent or felonious acts; a history of nonpayment; lack of management integrity, etc.