



Merry C. McNutt, MBA, CPA

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NEW CLIENT INFORMATION FORM

Please complete the following personal information for your household. Included in the introductory paperwork, you will find a list of things to bring with you for your meeting with your tax preparer at our office.

BASIC TAXPAYER INFORMATION

Name: _____
Address: _____
_____ Home Phone: _____
Mobile Phone: _____
Email Address: _____

| | Taxpayer | Spouse |
|-----------------------------------|----------|--------|
| Name: | _____ | _____ |
| Date of Birth: | _____ | _____ |
| Social Security Number: | _____ | _____ |
| Occupation: | _____ | _____ |
| Work Phone: | _____ | _____ |
| May we call you at work? (Y/N) | _____ | _____ |
| Email address: | _____ | _____ |
| May we correspond by email? (Y/N) | _____ | _____ |
| Cell Phone: | _____ | _____ |

CERTIFIED PUBLIC
ACCOUNTANT



Merry C. McNutt, C.P.A., P.L.L.C.

DEPENDENTS

| Name | Date of Birth | SSN | Child Income | # of Month In the Home | Tuition Expense (if applicable) |
|-------------|----------------------|------------|-------------------------|-----------------------------------|--|
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Do you or your spouse wish to allocate \$3 to the Presidential Election Campaign Fund?

Primary: Yes_____ No_____ Spouse: Yes: _____ No:_____

May the IRS discuss this tax return with us? Yes_____ No_____