



NEW INDIVIDUAL CLIENT INFORMATION SHEET

Legal name for all family members (including yourself) as it appears on Social Security card, as well as dates of birth:

Table with 4 columns: Full Name, Relationship, Date of Birth, SSN. Multiple rows for family members.

Full Address, including 9 digit zip code(or postal code):

Three horizontal lines for address entry.

Telephone numbers (with area code):

Form for telephone numbers and e-mail addresses for both you and your spouse.

Occupations:

you: _____ your spouse: _____

Residency issues:

If any family member is not a U.S. Citizen, please provide name and country of citizenship:

U.S. Residents but non-U.S. citizens ONLY: please indicate immigration status in U.S. with type of visa and visa number as applicable:

How did you hear about us? _____ Date form completed _____

Reminder: Please bring in or send complete copies of last year's previous Federal and State tax returns, if not already provided. If you have ever filed a gift tax return, please provide a complete copy of the latest return filed for each family member.