



**Individual Client Application**

Primary Contact \_\_\_\_\_

SSN \_\_\_\_\_ (First) \_\_\_\_\_ (Middle) \_\_\_\_\_ (Last)  
 Date of Birth \_\_\_\_\_ Nickname \_\_\_\_\_

Cell \_\_\_\_\_ Email \_\_\_\_\_

Work \_\_\_\_\_

Secondary Contact \_\_\_\_\_

SSN \_\_\_\_\_ (First) \_\_\_\_\_ (Middle) \_\_\_\_\_ (Last)  
 Date of Birth \_\_\_\_\_ Nickname \_\_\_\_\_

Cell \_\_\_\_\_ Email \_\_\_\_\_

Work \_\_\_\_\_

\_\_\_\_\_  
 (Address) (City) (State) (Zip)

\_\_\_\_\_  
 (Dependent Name) (Date of Birth) (SSN)

\_\_\_\_\_  
 (Dependent Name) (Date of Birth) (SSN)

\_\_\_\_\_  
 (Dependent Name) (Date of Birth) (SSN)

\_\_\_\_\_  
 (Dependent Name) (Date of Birth) (SSN)

If you have a business, farm or rental property, please complete the following:

\_\_\_\_\_  
 (Name of Business) (Nature of Business)

Is the business an LLC? Y N Business Tax ID \_\_\_\_\_

\_\_\_\_\_  
 (Name of Farm) (Nature of Farm Operations)

Is the farm an LLC? Y N Business Tax ID \_\_\_\_\_

**Rental Property Information:**

(Address of Rental Property)	(Residential or Commercial)
(Address of Rental Property)	(Residential or Commercial)
(Address of Rental Property)	(Residential or Commercial)
(Address of Rental Property)	(Residential or Commercial)
(Address of Rental Property)	(Residential or Commercial)

If any of the rental properties are organized as LLCs, please provide us with the LLC name(s) and federal tax ID(s).

Please indicate specific accounting or tax concerns you would like to discuss with our firm.

I hereby attest that the information provided above is accurate and correct.

\_\_\_\_\_  
Signature of Applicant

\_\_\_\_\_  
Date