



**Bookkeeping, QuickBooks Training, Tax Preparation and Planning, Business Valuations**

## **2019 Tax Season New Client Questionnaire**

**Welcome aboard and thanks for becoming a client!** We look forward to working with you and hope that we can work together for many years.

**Please forward us a copy of your prior year federal AND state income tax return.** If we have this, we can minimize the questions we ask. Additionally, there are tax carryforwards from one year to the next which we won't know about unless we have a copy of the tax returns

Please list the name and birthday of each person who is listed on your 2018 tax return. Please include the year born for all birthdays listed:

Name _____	Birthday _____
Name _____	Birthday _____
Name _____	Birthday _____
Name _____	Birthday _____
Name _____	Birthday _____
Name _____	Birthday _____
Name _____	Birthday _____
Name _____	Birthday _____

Primary Email Address \_\_\_\_\_

We often communicate by email. We will sign you up for our free email newsletter; if you decide you do not wish to receive it you can opt out; however, we highly recommend that you at least skim it once per month.

In many cases the amount you paid in tax preparation fees in 2019 (for 2018 taxes) is a legitimate tax deduction that we can deduct on your 2019 taxes (prepared in 2020):

2018 tax return fees paid in 2019 \_\_\_\_\_

How did you hear about SBS CPA Group? \_\_\_\_\_

We are always looking to improve the services we provide to our clients. With that in mind we would truly like to know why you decided to become our client this year:

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**Thank you for filling out this short form!!!**

Sincerely, Brent, Karena, and Mike