



Bookkeeping, QuickBooks Training, Tax Preparation, and Tax Planning

2020 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 2019 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 _____

In many cases the amount you paid in tax preparation fees in 2020 (for 2019 taxes) is a legitimate tax deduction that we can deduct on your 2020 taxes (prepared in 2021):

2019 tax return fees paid in 2020 _____

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:

Thank you for filling out this short form!!!

Sincerely, Brent, Karena, and Mike
