

KATHY PAVLOVSKY, CPA
NEW CLIENT INFORMATION

SS# _____

NAME _____

OCCUPATION _____ DOB _____

ADDRESS _____

EMAIL ADDRESS _____

PHONE _____

SPOUSE SS# _____

SPOUSE NAME _____

OCCUPATION _____ DOB _____

EMAIL ADDRESS _____

PHONE _____

DEPENDENTS:

NAME _____

Please Circle:

daughter

son

other _____

SS# _____

DOB _____

OCCUPATION _____

NAME _____

Please Circle:

daughter

son

other _____

SS# _____

DOB _____

OCCUPATION _____

Items Needed:

_____ Prior Year Tax Return

_____ Engagement letter

_____ Check in Sheet

_____ Set Up in Taxdome - invitation sent

_____ Other -