

## CLIENT INFORMATION SHEET

Name \_\_\_\_\_ SSN \_\_\_\_\_

Occupation \_\_\_\_\_ DoB \_\_\_\_\_

Spouse \_\_\_\_\_ SSN \_\_\_\_\_

Occupation \_\_\_\_\_ DoB \_\_\_\_\_

Child \_\_\_\_\_ SSN \_\_\_\_\_

\_\_\_\_\_ DoB \_\_\_\_\_

Child \_\_\_\_\_ SSN \_\_\_\_\_

\_\_\_\_\_ DoB \_\_\_\_\_

Home Address \_\_\_\_\_

Business Name & Address \_\_\_\_\_

### Phone Numbers

Home \_\_\_\_\_ Work \_\_\_\_\_

Fax \_\_\_\_\_ Cell \_\_\_\_\_

Spouse Work \_\_\_\_\_ Cell \_\_\_\_\_

Email address \_\_\_\_\_

EIN # \_\_\_\_\_ UBI# \_\_\_\_\_

L&I Acct # \_\_\_\_\_ ES Ref # \_\_\_\_\_

***Due to increased fraud the IRS requires us to verify your identity with one of the following:***

***\*Passport \*Driver's License \*State ID \*Bank, Utility, or CC Statement***