



**Innovative Tax and Accounting Solutions, LLC**

**Client Sheet**

*Note to Firm: Modify this as needed*

New Client:  Current Client:

Date Completed: \_\_\_\_\_

**Client Information**

\*Name: \_\_\_\_\_ S.S.#: \_\_\_\_\_

\*Date of Birth: \_\_\_\_\_

\*Spouse Name: \_\_\_\_\_ S.S.#: \_\_\_\_\_

\*Date of Birth: \_\_\_\_\_

\*Address: \_\_\_\_\_

\*Home Telephone: \_\_\_\_\_ \*Mobile Telephone: \_\_\_\_\_

\*Email: \_\_\_\_\_

Marital Status: Single  Married  Divorced  Separated

Area(s) to Discuss: \_\_\_\_\_

Meeting Date: \_\_\_\_\_

Meeting with: \_\_\_\_\_

Preferred Method of Contact:

Phone (Client/Spouse)  Email (Client/Spouse)  Text (Client / Spouse)

Referred By: \_\_\_\_\_

**Questions for the Firm/Accountant:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



**Innovative Tax and Accounting Solutions, LLC**

**FOR OFFICE USE ONLY**

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**Meeting Notes:**

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*Initial and Date the following items when completed:*

New Client Set Up: \_\_\_\_\_

Fee Agreement: \_\_\_\_\_

Engagement Letter Y or N : \_\_\_\_\_

Save Form in Onvio and send Client Center Access: \_\_\_\_\_