

New Client Questionnaire:

Name: _____

Phone Number: _____

Email Address: _____

1) Who referred you, or how did you find out about me.

2) What services do you require of us (I.e. tax return, financial statements, management services)

3) how involved is your return (I.e. business, rentals, property sales, multi-state).

4) Who was your preparer last year?

Fees:

Minimum fee for a new individual client is	\$ 750.00
Business Return	\$ 1,000.00
Hourly rate	\$ 250.00

This fee is only the starting point, your return could be higher based on complexity. Due to Tax season work load any new clients will be extended for this first year should you become a client.

(note any new clients who contact me during tax season will have to be extended. If this is acceptable I will need your 2023 data and your 2022 Tax return dropped off in my office or emailed to me before 3/31/2024).