



"Build Different, Grow Together"

Drop-Off Bookkeeping/Tax Intake Form

Today's Date: _____

Name: _____ DOB: ___/___/___ Last 4 SSN: _____

Occupation: _____

Filing Status: Single (\$12,200) Head of Household (\$18,350) Married Filing Joint (\$24,400)

Married Filing Separately (\$12,200)

Address: _____ State: _____ Zip Code: _____

Check all items that apply to your income:

W-2's 1099-Misc 1099-R SSA-1099

Do you own any rental properties?

Yes No

Do you have a business?

Yes No

If yes, please indicate which one applies:

LLC S-Corp C-Corp

How will bank statements be provided

to Build & Grow?

Monthly Quarterly Yearly

Does the company have a business account?

Yes No

If answered no, please black out any personal expenses on the bank statements

Did you itemize last year?

Yes No

Claiming any dependents? How Many? ____

Yes No

If yes, fill out information below:

DOB: ___/___/___

Child in School? Yes No

Daycare? Yes No

Tuition? Yes No

Any additional questions, comments or concerns please enter below:
