

**New Client Information**

Date \_\_\_\_\_

\_\_\_\_\_  
FIRST NAME LAST NAME

\_\_\_\_\_  
SSN#                      DOB

\_\_\_\_\_  
MAILING ADDRESS                      CITY/STATE/ZIPCODE

\_\_\_\_\_  
SPOUSES FIRST NAME                      SPOUSES LAST NAME

\_\_\_\_\_  
SPOUSES SSN#                      SPOUSES DOB

\_\_\_\_\_  
PH:HOME                      PH:CELL

\_\_\_\_\_  
Work PH:                      Email:

**Reason for Consultation:**

- \_\_\_\_\_ IRS Collection
- \_\_\_\_\_ IRS Audit
- \_\_\_\_\_ Other IRS Notice
- \_\_\_\_\_ Personal Tax Return/Preparation
- \_\_\_\_\_ Corporate Tax Return/Preparation
- \_\_\_\_\_ Last year returns were filed

**Referred by:**

- Attorney:** \_\_\_\_\_
- CPA:** \_\_\_\_\_
- Website:** \_\_\_\_\_
- Golf Channel:** \_\_\_\_\_
- Other:** \_\_\_\_\_

Other Concerns: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Prospective Client acknowledges that until a Written Retainer Agreement is signed by the prospective client and Gilbert J. Munoz, the prospective client is not represented by any capacity by Gilbert J. Munoz, CPA

Prospective Client Signature: \_\_\_\_\_