Jeffrey B. Smith, CPA, P.A.
Certified Public Accountants and Consultants

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New Client Information

Tell us about you and what you need. Jeff will review this before your first meeting.

Please note: Do not write Social Security or bank account numbers here. Jeff collects those securely through the portal.

About you

Full legal name

Spouse's full name (if filing jointly)

Street address

City, state and ZIP

Phone

Email

Preferred contact

Filing status last year

Occupation

Number of dependents

How we can help

Services needed

- ☐ Individual tax return
- ☐ Business tax return
- ☐ IRS or state notice
- ☐ Tax planning
- ☐ Bookkeeping or payroll
- ☐ Estate or trust return

Anything Jeff should know before you meet?

How did you hear about us?

Signature

Date

Return this form through your secure client portal at jbsmithcpa.sharefile.com or bring it to your appointment. Please do not email it.