Andrews-Drummond Group, P.C.

New Client Onboarding Information

Welcome and thank you for the opportunity to serve you. We know that preparing your taxes is not the most exciting thing to do. But getting your taxes together in a timely and organized fashion will help us to get the best results for you possible. We have created this form to help with a smooth transition to our firm. Should you have any questions, please contact us at either of the numbers below. We look forward to working with you!

☐ **Personal Information** – Please fill out the applicable sections below.

Taxpayer Personal Information			
Name:		DOB:	SSN:
Address:			
Email:		Occupation:	
Primary Phone:	☐ Cell ☐ Home ☐ Work	Secondary Phone:	☐ Cell ☐ Home ☐ Work
Spouse Personal Information			
Name:		DOB:	SSN:
Email:		Occupation:	
Primary Phone:	☐ Cell ☐ Home ☐ Work	Secondary Phone:	☐ Cell ☐ Home ☐ Work
Marital Status: ☐ Single ☐ Married* ☐ Divorced*			
* Please provide date of marriage or divorce:			
Dependent #1		DOB:	SSN:
Name:		Relationship to you:	
Dependent #2		DOB:	SSN:
Name:		Relationship to you:	
Dependent #3		DOB:	SSN:
Name:		Relationship to you:	
Dependent #4		DOB:	SSN:
Name:		Relationship to you:	

☐ Copy of Social Security Card for ALL individuals listed on tax return.

☐ Copy of driver's license (front only) for both Taxpayer and Spouse.

☐ Copy of prior year tax return and supporting documents.

☐ Bank Information for setting up direct deposit/direct payment

- ☐ Voided check - or –
- ☐ Name as shown on the account, Bank Name, Routing Number, Account Number, Account type (checking or savings)

☐ Complete the following forms, found on the INFORMATION page of our website:

- ☐ Income Tax Checklist – also provide any information/forms these questions require.
- ☐ Due Diligence – also provide any information/forms these questions require.
- ☐ Tax Questionnaire – *optional* but there may be pages that contain information you need to provide to us.

Contact Information:

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