

Internal Use Only

Date: _____

☐ Appt ☐ DO ☐ Mail ☐ Email ☐ Fax | ☐ C ☐ W ☐ V

GENERAL INFORMATION

Name _____ EIN _____

Fiduciary Name _____ Title _____

STREET ADDRESS (to be reflected on the return)

Address _____

City _____ ST _____ Zip Code _____

CONTACT INFORMATION

PRIMARY CONTACT

Name _____

Title _____

Email _____

Best PH _____

Signing Return? ☐ NO ☐ YES

SECONDARY CONTACT

Name _____

Title _____

Email _____

Best PH _____

Signing Return? ☐ NO ☐ YES

OTHER INFORMATION

Entity Type _____ Date Created _____
(MM/DD/YYYY)

Referred by: _____ ☐ Google ☐ Facebook ☐ Other _____

HOW WOULD YOU LIKE TO RECEIVE YOUR COPY OF THE TAX RETURN?

☐ Paper Copy in Blue Folder ☐ Electronic Copy via Email ☐ Both Paper & Electronic

WOULD YOU PREFER TO SIGN ANY FORMS ELECTRONICALLY?

☐ NO ☐ YES (please confirm email address above)

BENEFICIARY 1

Name _____ SSN/Tax ID # _____

Title _____ Ownership % _____ %

Address _____

City _____ ST _____ Zip Code _____

Best PH _____ Email _____

BENEFICIARY 2

Name _____ SSN/Tax ID # _____

Title _____ Ownership % _____ %

Address _____

City _____ ST _____ Zip Code _____

Best PH _____ Email _____

BENEFICIARY 3

Name _____ SSN/Tax ID # _____
Title _____ Ownership % _____ %
Address _____
City _____ ST _____ Zip Code _____
Best PH _____ Email _____

BENEFICIARY 4

Name _____ SSN/Tax ID # _____
Title _____ Ownership % _____ %
Address _____
City _____ ST _____ Zip Code _____
Best PH _____ Email _____

BENEFICIARY 5

Name _____ SSN/Tax ID # _____
Title _____ Ownership % _____ %
Address _____
City _____ ST _____ Zip Code _____
Best PH _____ Email _____

BENEFICIARY 6

Name _____ SSN/Tax ID # _____
Title _____ Ownership % _____ %
Address _____
City _____ ST _____ Zip Code _____
Best PH _____ Email _____

NOTES or OTHER INFORMATION YOU WOULD LIKE US TO KNOW

BENEFICIARY 7

Name _____ SSN/Tax ID # _____
Title _____ Ownership % _____ %
Address _____
City _____ ST _____ Zip Code _____
Best PH _____ Email _____

BENEFICIARY 8

Name _____ SSN/Tax ID # _____
Title _____ Ownership % _____ %
Address _____
City _____ ST _____ Zip Code _____
Best PH _____ Email _____

BENEFICIARY 9

Name _____ SSN/Tax ID # _____
Title _____ Ownership % _____ %
Address _____
City _____ ST _____ Zip Code _____
Best PH _____ Email _____

BENEFICIARY 10

Name _____ SSN/Tax ID # _____
Title _____ Ownership % _____ %
Address _____
City _____ ST _____ Zip Code _____
Best PH _____ Email _____

BENEFICIARY 11

Name _____ SSN/Tax ID # _____
Title _____ Ownership % _____ %
Address _____
City _____ ST _____ Zip Code _____
Best PH _____ Email _____

BENEFICIARY 12

Name _____ SSN/Tax ID # _____
Title _____ Ownership % _____ %
Address _____
City _____ ST _____ Zip Code _____
Best PH _____ Email _____