



## Wright CPA Group PA

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### Client Information

Date : \_\_\_\_\_

How may we be of assistance?

\_\_\_\_\_  
\_\_\_\_\_

How did you hear about us? \_\_\_\_\_

Would you like to receive our email updates?      Yes      No

### **Individual 1 / Taxpayer**

Name : \_\_\_\_\_ Preferred Contact Method : \_\_\_\_\_

Email address : \_\_\_\_\_ Phone number : \_\_\_\_\_

Mailing address \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Occupation: \_\_\_\_\_

### **Individual 2 / Spouse (if applicable)**

Name : \_\_\_\_\_ Preferred Contact Method : \_\_\_\_\_

Email address : \_\_\_\_\_ Phone number : \_\_\_\_\_

Mailing address \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Occupation: \_\_\_\_\_

### **Business (if applicable)**

Name: \_\_\_\_\_ DBA: \_\_\_\_\_ EIN: \_\_\_\_\_

Business Type:    Sole Proprietorship    Partnership    LLC    Corporation    S Corporation

Do you have Quickbooks?    Yes    No      Desktop    Online

Do you have payroll?    Yes    No      Frequency? \_\_\_\_\_

FOR OFFICE USE ONLY

APPOINTMENT : \_\_\_\_\_

## DISCUSSIONS :

[illegible]

### FOLLOW UP AFTER MEETING :

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## PROJECTS TO SET UP IN KARBON:

(Engagement letter type, payroll frequency, quarterly and year end, annual report, billing frequency, 8655 needed, sales tax, bookkeeping, financials, etc) (Accountant in charge and reviewer)

[illegible]