



**INFORMATION ABOUT YOU,  
OUR NEW CLIENT**

Today's Date: \_\_\_\_\_

**Client A:** \_\_\_\_\_

(Please specify exactly how you would like your name to appear in any document(s) prepared by this office - i.e. do you want a middle initial, do you use Jr. or III? (Example: John Doe, or John S. Doe, or John S. Doe, III)

**Date of Birth:** \_\_\_\_\_ **S.S.N.** \_\_\_\_\_

Married  Single  Divorced  Widowed  Partner  Date of Marriage: \_\_\_\_\_

Cell: \_\_\_\_\_ E-mail: \_\_\_\_\_

U.S. Citizen?  Yes  No Have you lived in CA, WA, NV, AZ, NM, TX, ID, LA, WI? (circle)

**Client B (if any):** \_\_\_\_\_

(Please specify exactly how you would like your name to appear in any document(s) prepared by this office - i.e. do you want a middle initial, do you use Jr. or III? (Example: John Doe, or John S. Doe, or John S. Doe, III)

**Date of Birth:** \_\_\_\_\_ **S.S.N.** \_\_\_\_\_

Married  Single  Divorced  Widowed  Partner  Date of Marriage: \_\_\_\_\_

Cell: \_\_\_\_\_ E-mail: \_\_\_\_\_

U.S. Citizen?  Yes  No Have you lived in CA, WA, NV, AZ, NM, TX, ID, LA, WI? (circle)

**Home Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State** \_\_\_\_\_ **Zip:** \_\_\_\_\_ **County:** \_\_\_\_\_

**Home Phone:** \_\_\_\_\_ **Home Fax:** \_\_\_\_\_

**Mailing/Billing Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State** \_\_\_\_\_ **Zip:** \_\_\_\_\_ **County:** \_\_\_\_\_

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

Would you prefer to hear from us via e-mail or U.S. mail?  E-mail  U.S. mail