



**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