

Lewis D. Crusoe, EA
 New Client Intake Information Form

Please complete the following form and bring it with you to your appointment.
 DO NOT email the completed form because it contains personally identifiable
 information and email is not secure.

Also, please bring your social security card(s) and your driver's license(s).

PERSONAL INFORMATION	TAXPAYER	SPOUSE
First Name & initial		
Last Name		
Social Security Number		
Date of Birth		
Occupation		
Email address		
Home Phone Number		
Cell Phone Number		
Street Address		
City		

Taxpayer legally blind Yes No

Spouse legally blind Yes No

Taxpayer Disabled Yes No

Taxpayer Disabled Yes No

Pres. Campaign Fund..... Yes No

Pres. Campaign Fund..... Yes No

Filing Status: Single Head of Household Married joint Married Separate Widower Yr of Death _____

In addition to this form, please complete the 2024 Tax Preparation Questionnaire found on the same webpage on which you found this form.

Thank you for your cooperation.