



AAA Tax Plus LLC DBA Bee Wise Tax and More

Client Data Sheet

Please Fill-out this form prior to your appointment and bring a copy of last year's return if you're a new client. If you answer YES to any of the questions under GENERAL INFORMATION, please bring the necessary documentation for validation purposes.

Primary Name		DOB		SSN	
		DL#		Exp.	
Spouse Name		DOB		SSN	
		DL#		DL#	
Current Address				City, State	Zip Code
E-mail Address					
Phone #				<input type="checkbox"/> Mobile	<input type="checkbox"/> Landline
Marital Status	<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Widowed <input type="checkbox"/> Divorced				
DEPENDANTS					
NAME	DOB	SSN	Relationship	Months in Home	Health Insurance
GENERAL INFORMATION					
Are you a New Customer?	<input type="checkbox"/> Yes <input type="checkbox"/> No		How did you learn about us?	<input type="checkbox"/> Internet <input type="checkbox"/> Client <input type="checkbox"/> Flyer <input type="checkbox"/> Friend/ Family Please specify Referrers Name _____	
Did you file a tax return last year?	<input type="checkbox"/> Yes <input type="checkbox"/> No		Do you have rental Property?	<input type="checkbox"/> Yes <input type="checkbox"/> No How many rentals do you have? _____	
Did attend college last year?	<input type="checkbox"/> Yes <input type="checkbox"/> No		Do you own a business?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please specify business type. <input type="checkbox"/> LLC <input type="checkbox"/> S-Corp <input type="checkbox"/> C-Corp <input type="checkbox"/> Sole Proprietor Business Name: _____	
Do you own a home?	<input type="checkbox"/> Yes <input type="checkbox"/> No		Do you own a Farm?	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Please call 540-412-2741 to schedule your appointment!
Website: beewisetaxandmore.com