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### New Client Starter Guide

Please upload this form by navigating to [www.pskcpa.com](http://www.pskcpa.com) and selecting "upload a file" at the top prior to our meeting.

Full Name: Taxpayer: \_\_\_\_\_ DOB: \_\_\_\_\_  
Spouse: \_\_\_\_\_ DOB: \_\_\_\_\_  
Occupation: Taxpayer: \_\_\_\_\_ Spouse: \_\_\_\_\_  
Phone #: Taxpayer: (\_\_\_\_) \_\_\_\_\_ Spouse: (\_\_\_\_) \_\_\_\_\_ E-Mail: \_\_\_\_\_  
Entity Names and Types: \_\_\_\_\_  
Married? NO YES Date: \_\_\_\_\_ Divorced? NO YES Date: \_\_\_\_\_ Widowed? NO YES Date: \_\_\_\_\_  
Children & DOB: \_\_\_\_\_  
Other Dependents & DOB: \_\_\_\_\_

Information needed for our first meeting (if available):

#### Personal Information:

- Tax Returns (2 most recent income tax returns filed with the IRS, state and local governments)
- Net Worth Statement (a list of what you own and what you owe)
- Most recent month end statements for all significant investments
- Pay Stubs (most recent one in current year)
- Will, trusts, divorce decrees, separation agreements and pre or post-nuptial agreements

#### Business Information

- Business Tax Returns (2 most recent if different than the personal returns mentioned above)
- Payroll Tax Returns (most recent list of each employee and wages paid – W-2's would be great)
- Balance Sheet (most recent list of what the business owns and owes)
- Income Statement (most recent list of what the business had in sales and expenses)
- Buy/sell agreements and succession plan
- Organizational documents: partner/shareholder/member agreement  
S.O.S certificate of formation  
Texas franchise webfile number

Prepared By: \_\_\_\_\_ Date: \_\_\_\_\_