

**C. Sargent,
& Bryan, Inc.**

Tax Preparation &
Bookkeeping

Founder
**Charles R. Sargent
(1941-2017)**

Shelley Bryan

Mike Bryan

1332 Coffee Road
Modesto, CA 95355

Phone: (209) **525-9855**

Fax: (209) **525-9785**

New Client Information

Please fill out the following forms so we can gather enough information to be sure to cover everything that is needed!

After filling out these pages please submit them back to our office via fax (209) 525-9785 or e-mail to

Reception@taxsargent.com.

From there, our office will contact you to make the most convenient appointment possible.

There will be a \$125.00 consultation fee

What to Bring to the Appointment:

The last tax return that was filed.

Any documents that are needed to complete the current tax return.

Any documents you have questions on.

Also, the consultation fee will be due upon arrival in either cash or check form.

Thank you!

C. Sargent & Bryan Staff

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New Client Form

General Information

Name _____

Spouse Name _____

Address _____

City, State & Zip Code _____

Billing Address (If Different) _____

Work # _____ Home# _____

Cell # _____ Cell # _____

E-mail Address _____

E-mail Address _____

Social Security # _____

Spouse Social Security # _____

Birth date _____ Spouse _____

Who Referred you? _____

Did you use another accounting firm previously? If so, who? _____

Dependants

Name	Birthdates	Social Security #
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_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

FOR INTERNAL USE:

Tax Preparer: _____

Meeting date and time: _____

Services: Income Tax Consulting Bookkeeping

Consultation Fee Amount: \$ _____

Cash Check # _____

Collected By: _____

Date Collected: _____

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Entity Information

Legal Name _____

DBA _____

Address _____

City, State & Zip Code _____

Billing Address (If Different) _____

Primary Business Activity/Type _____

Entity: Sole Proprietor Partnership S-Corp C-Corp LLC LP

Date of Incorporation _____

Tax ID # _____

Secretary of State # _____

EDD # _____

Calendar Year/Fiscal Year _____

Corporate Attorney Name _____

Officers/Members

Name

Title

%Ownership

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Do you use any form of accounting or tax software now? If so,
which software? _____

QuickBooks Version and Year: _____

QuickBooks Name and Password: _____

What services are you interested in?

☐ Business Tax Return (Corp, Partnership, Non-Profit, Trust/Estate)

☐ Individual Income Tax Return

☐ Bookkeeping

☐ Payroll/Sales Tax/Mill Tax

☐ Consulting (Strategic, Financial, Operations, Audits, General Tax)

☐ QuickBooks Set up/Guidance

When do you need to begin the services checked above?
