**Client Questionnaire**

Click or tap to enter a date.

**Name:**Click or tap here to enter text.

**Phone Number:**Click or tap here to enter text.

**Business Name** *(If Applicable)***:**Click or tap here to enter text.

**Mailing Address:**Click or tap here to enter text.

**Email:**Click or tap here to enter text.

1. **How did you hear about WesTax, Inc.?**

Click or tap here to enter text.

1. **What services are you looking for? *(Please indicate for both Personal and/or Business if applicable).***

Click or tap here to enter text.

1. **Why are switching from your previous CPA/Tax Preparer?**

Click or tap here to enter text.

1. **What type of taxable income & expenses do you have?? *(W-2 job income, 1099 contractor income, pension/IRA distributions, Investment/rental Properties, Brokerage/Investment Accounts, Mortgage, Charity, Child Costs, Educational Costs, Etc.)***

***~ Please list all that apply ~***

Click or tap here to enter text.

1. **Do you have any unfiled tax returns not mentioned above or do you owe any past due taxes?**

Click or tap here to enter text.