

**PATRICIA A. BECKWITH**  
**CERTIFIED PUBLIC ACCOUNTANT**  


**New Client Information Sheet**

Date: \_\_\_\_\_

*Please print your name(s) as they appear on your tax return:*

Taxpayer's Name: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

**Taxpayer's Info:**

Home: \_\_\_\_\_ Cell: \_\_\_\_\_ DOB: \_\_\_\_\_

E-Mail: \_\_\_\_\_ SS# \_\_\_\_\_

**Spouse's Info:**

Cell: \_\_\_\_\_ DOB: \_\_\_\_\_

Email: \_\_\_\_\_ SS# \_\_\_\_\_

*Please circle one:*

How did you first hear of my services? **Internet** or **Social Media** or **Referral** or **Other**  
Referred by: \_\_\_\_\_

How do you prefer to receive your Tax Organizer? **SmartVault (electronic)** or **Paper**

Please provide a brief description of what brings you here today:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Thank you very much for your business!**