

New Client Data

Date: _____

Taxpayer (T) _____ Spouse(S) _____

Occupation (T) _____ Occupation (S) _____

Address _____ City _____ State _____ Zip _____

Home tel (T+S) _____ Referred by _____

Work tel (T) _____ Work tel (S) _____

Cell (T) _____ Cell(S) _____

Email (T) _____ Email (S) _____

FAX (T) if private _____ FAX (S) if private _____

Married Single Head of Household Number of Dependents _____

Notes _____

WE RECOMMEND THAT YOU PROVIDE US WITH YOUR LAST 3 YEARS OF TAX RETURNS
 THE INFO BELOW IS NOT NECESSARY BUT MAY BE HELPFUL IN DISCUSSING YOUR TAX SITUATION

Approximate Income:

Wages (T) _____ (S) _____

Freelance (T) _____ (S) _____

Interest _____ Dividends _____

Other Income/Losses _____ Source _____

Itemized Deductions	Business Expenses		Adjustments to Income	
	(T)	(S)	(T)	(S)
Medical _____	Supplies _____		<input type="checkbox"/> IRA _____	
Prop. Tax _____	Travel/Enter. _____		<input type="checkbox"/> Moving _____	
Mortgage _____	Furn./Equipt. _____		<input type="checkbox"/> Health Insur. _____	
Contributions _____	Advertising _____		<input type="checkbox"/> Keogh/SEP _____	
Job Related _____	Misc. Expenses _____		Other _____	

PLEASE FAX OR MAIL THIS SHEET TO US. DO YOU WANT US TO CALL YOU? CHECK HERE

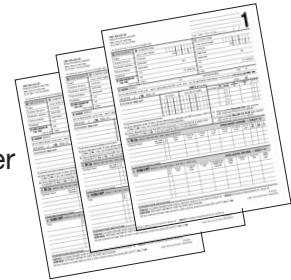
New Client Information

Schedule Your Appointment Online

You may schedule an appointment online from our home page, go to www.judakallus.com or call us at **212.727.9811**.

Download our Data Organizer

Go to our website, and download our basic data organizer. You may also choose additional sheets you may need for gathering your tax information. If you are self employed Sheet #3 is essential.

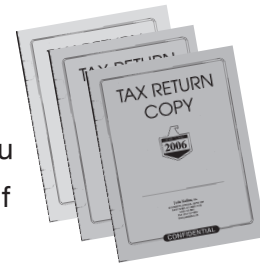


Fill Out Our Data Sheets

Before you come for your appointment, please fill out our forms with the information we request. It is not necessary to bring receipts with you. Just put the total amounts on our data sheets. Round up if over 50¢ or down if under 50¢ to the nearest dollar amount. Always fill out your data sheets in pencil. It is easier to edit and revise the tax data.

Bring or Send us Your Last 3 Years of Tax Returns

Since this is your first time as a new client, we ask that you bring with you copies of your last three years tax returns. If you don't have the last three, bring as many as you have.



Write Down Any Questions

If you have questions about what goes where, please write down your questions and we will help you when you come in for your appointment. If you are unable to come in for an appointment please send your questions in with your organizer. It is important that you give us all the latest information.