

# CLIENT PROFILE

<b>Client Name and General Info</b>	C1: First Name:	C1: MI:	C1: Last Name:			
	C2: First Name:	C2: MI:	C2: Last Name:			
	C1: Birth Date:		C1: SSN:			
	C2: Birth Date:		C2: SSN:			
<b>Address</b>	Street			Suite/Apt		
	City			State	Zip	
<b>Contact Info</b>	Home	C1: Cell:		C1: Email:		
		C2: Cell:		C2: Email:		
<b>Current Employment</b>	C1: Taxpayer Employer:			C1: Work Phone:		
	C2: Taxpayer Employer:			C2: Work Phone:		
<b>Dependent Information (Only input if your dependent falls under the IRS's definition of "qualifying dependent")</b>						
	First Name	MI	Last Name	SSN	Birth Date	Relationship

If you are filing **jointly**, have your spouse use **C2 section** for the following questions.

Please Circle YES or NO

**Did you receive any Schedule K-1 forms for shares in a Partnership, Limited Liability Company or Subchapter S Corporation?**

C1: YES/ NO

C2: YES/NO

*If yes, please bring copies of all of your Schedule K-1 forms.*

**Do you own any annuities?**

C1: YES/ NO

C2: YES/NO

C1: If yes, did you make any withdraws? Yes (amount): \_\_\_\_\_ No: \_\_\_

C2: If yes, did you make any withdraws? Yes (amount): \_\_\_\_\_ No: \_\_\_

**Do you own a Traditional (not Roth) IRA or 401K?**

C1: YES/ NO

C2: YES/NO

➔ C1: If yes, did you contribute to it? Yes (amount): \_\_\_\_\_ No: \_\_\_

➔ C2: If yes, did you contribute to it? Yes (amount): \_\_\_\_\_ No: \_\_\_

**Did you contribute to your spouse's IRA this year?**

C1: YES/ NO

C2: YES/NO

➔ C1: If yes, what amount: \_\_\_\_\_

➔ C2: If yes, what amount: \_\_\_\_\_

**Did you take a withdrawal or distribution before age 59 ½ from a pension plan or IRA? (Only answer if you're 61 and under)**

C1: YES/ NO

C2: YES/NO

➔ C1: If yes, what was the amount: \$ \_\_\_\_\_

➔ C2: If yes, what was the amount: \$ \_\_\_\_\_

**Did you have any qualifying charitable donations (QCD), meaning you donated money directly from your Traditional IRA?**

C1: YES/ NO

C2: YES/NO

➔ If yes, fill in below:

Charity: \_\_\_\_\_ Charity: \_\_\_\_\_

Amount: \_\_\_\_\_ Amount: \_\_\_\_\_

