



# SEE Solutions LLC

## New Client Information Sheet

### Personal Information

Legal Name: \_\_\_\_\_  
Nickname: \_\_\_\_\_  
SS#: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Occupation: \_\_\_\_\_  
Employer: \_\_\_\_\_

### Spouse / Partner Information

Legal Name: \_\_\_\_\_  
Nickname: \_\_\_\_\_  
SSN#: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Occupation: \_\_\_\_\_  
Employer: \_\_\_\_\_

### Phone Numbers

Home: \_\_\_\_\_  
Cell: \_\_\_\_\_  
Work: \_\_\_\_\_  
Fax: \_\_\_\_\_

### Phone Numbers

Home: \_\_\_\_\_  
Cell: \_\_\_\_\_  
Work: \_\_\_\_\_  
Fax: \_\_\_\_\_

Email: \_\_\_\_\_  
Preferred Method of Contact: \_\_\_\_\_  
Physical Address: \_\_\_\_\_

Email: \_\_\_\_\_  
Preferred Method of Contact: \_\_\_\_\_  
Physical Address: \_\_\_\_\_

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

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

Marital Status (Single / Separated / Divorced / Widowed / Married / Other): \_\_\_\_\_

Do you want direct deposit for refunds (Y/N): \_\_\_\_\_

Bank Name: \_\_\_\_\_

Routing Number: \_\_\_\_\_ Account Number: \_\_\_\_\_

Name on Account: \_\_\_\_\_ Type of Account: \_\_\_\_\_

Please Turn Over →

### Dependent Information

	Date of Birth:	Nights residing with you:	College Student (Y/N):
Name:	_____	_____	_____
SS#:	_____	_____	_____
Name:	_____	_____	_____
SS#:	_____	_____	_____
Name:	_____	_____	_____
SS#:	_____	_____	_____
Name:	_____	_____	_____
SS#:	_____	_____	_____
Name:	_____	_____	_____
SS#:	_____	_____	_____

Due to identity fraud issues, SEE Solutions LLC requires copies of social security cards and driver's licenses (if applicable) for all individuals. Please bring the originals in so that we may copy them for our records. Thank you

### How did you hear about SEE Solutions LLC?

- |  |   |
|--|---|
| <input type="checkbox"/> Referral Who? _____                 | <input type="checkbox"/> QuickBooks Proadvisor      |
| <input type="checkbox"/> Brochure or Flyer                   | <input type="checkbox"/> IRS Enrolled Agent Listing |
| <input type="checkbox"/> Google                              | <input type="checkbox"/> NAEA Listing               |
| <input type="checkbox"/> Internet Search (Other than Google) | <input type="checkbox"/> Other _____                |
| <input type="checkbox"/> Facebook                            |   |

### OFFICE USE ONLY:

Enter Into  
Date Entered

Tax	Portal	QB	File

CLIENT CODE: