THE Mangold Group
Certified Public Accountants, PC

p 512.327.0909 | f 512.327.0904 | www.mangoldcpa.com

Note: Save this blank form, complete the information, save the form again, and email the completed form as an attachment to inquiry@mangoldcpa.com

NEW CLIENT APPLICATION - INDIVIDUAL

PRELIMINARY INFORMATION

Contact Name: ______________________________ Best Contact Phone #: ______________________

Alternate phone # ____ Fax: ______________________

Preferred Email: _____________________________Alternate optional email: _____________________

Alternate Contact Name: ______________________ Best Contact Phone #: ______________________

Preferred Email: _____________________________ Alternate optional email: _____________________

Home Address: ____

City: _____________________________________ State _________ Zip ________________

Business Address: ____

City: _____________________________________ State _________ Zip ________________

Check preferred mailing address: Home ☐, Business ☐, Other ☐

Individual tax clients: Please list taxpayers' and dependents' names and dates of birth:

Name of Taxpayer or Dependent	Date of Birth
1.	
2.	
3.	
4.	
5.	

If you are divorced, do you claim your dependents every year? Yes _____, No _____, N/A _____
Claim on odd / even years? Odd ☐, Even ☐, N/A ☐, Other arrangements? ___________________

Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?
Have you ever lived/worked abroad? If so, when? ____

Who referred you, or how did you hear of The Mangold Group? ________________________________

____

Who prepared your tax return last year? ____

What objectives to you want to accomplish in the initial interview appointment?

____

____

What long-term objectives do you want to achieve in working with The Mangold Group?

____

THE Mangold Group
Certified Public Accountants, PC

What are your expectations of your accountant /advisor? Do you want to be contacted periodically throughout the year? ______________________________

What is your preferred method of communication? (telephone / email / meet in person / mailings)

____

What response time do you expect in accounting and tax questions? ______________

Generally, we extend individual tax returns in which we do not receive all the information by March 1. Are you OK with extending your tax return, if necessary? Yes _______, No ________, N/A _____

Please list the most important service issues. ______________________________

OTHER ADVISORS

Who is your financial planner or stock broker? ______________________________

Do we have your permission to talk to them, if necessary, to request additional information? __________

Do you have a current will? __________________________ (Can we get a copy?) _________________

Have you established an estate plan? ______________________________

Do you have a trust? ________(Can we get a copy of the last filed return?) ________________________

Who is your attorney? ______________________________

Do you need recommendations of an attorney or financial advisor? ______________________________

CURRENT ACCOUNTING / CONSULTING RELATIONSHIP

Do you have a current Accountant / Accounting firm? ______________________________

If so, why are you considering changing CPA firms? ______________________________

____

Have you informed your current accountant that you are meeting with us? _________________________

Name of Current Accounting Firm ______________________________

Address ______________________________

Telephone ____________________________ E-Mail Address ______________________________

What DO you like about working with your current accountant? ______________________________

____

What DON'T you like about working with your current Accountant? ______________________________

____

____

Please provide us with the last 3 years of federal and state tax returns. We request a 50% retainer from new clients.