

New Client Pre-Screen

A short form to help us prepare for your first appointment. We'll cover everything else together when we meet. Questions?
kenn@stadel-tax.com

SECTION 1 — Taxpayer Information

Full legal name (as it appears on your tax return) *

Date of birth *

Occupation / Employer *

Phone *

Email address *

Mailing address (street, city, state, zip) *

Filing status:

☐ Single

☐ Married Filing Joint (MFJ)

☐ Married Filing Separate (MFS)

☐ Head of Household

☐ Qualifying Surviving Spouse

Spouse Information (if Married Filing Jointly)

Spouse full legal name

Spouse date of birth

Spouse occupation / employer

SECTION 2 — Dependents

Do you have any dependents to claim this year?

Yes ☐ No ☐

We'll get full details (names, DOBs, relationship, months in home) at the appointment.

SECTION 3 — Income Sources

Check all expected income sources for this tax year:

☐ W-2 Wages

☐ Self-employment

☐ Farm income

☐ Rental income

☐ Interest or dividends

☐ Capital gains

☐ Retirement distributions

☐ Social Security

☐ K-1 (partnership/S-corp/trust)

☐ Unemployment

☐ Other

SECTION 4 — Prior Year Return

Did you file a tax return last year?

Yes ☐ No ☐

Who prepared your prior year return?

Can you provide a copy of your prior year return?

Yes ☐ No ☐

SECTION 5 — Farm & Business

Do you operate a farm (Schedule F)?

Yes ☐ No ☐

Do you have business or self-employment income (Schedule C)?

Yes ☐ No ☐

We'll go through the details together at your appointment.

SECTION 6 — Engagement Information

How did you hear about Kenn Stadel, CPA?

Referred by (if applicable)

Preferred contact method:

☐ Email

☐ Phone call

☐ Text message

Preferred document delivery:

☐ Secure portal / electronic

☐ Paper / mail

SECTION 7 — Certification

I certify that the information provided on this form is accurate and complete to the best of my knowledge.

Taxpayer Signature

Date

Spouse Signature (if MFJ)

Date