

GEORGE H. HERRO
CERTIFIED PUBLIC ACCOUNTANT, S.C.

Business and Tax Advisors

CONFIDENTIAL NEW CLIENT INFORMATION/INTERVIEW FORM
PLEASE PRINT

Today's Date _____ Referred by _____

Client Name _____ Date of Birth _____

Address _____ City _____ State _____ Zip _____

Cell Phone _____ Work Phone _____ Home Phone _____

E-Mail _____ Occupation _____

Spouse Name _____ Date of Birth _____

Address _____ City _____ State _____ Zip _____

Cell Phone _____ Work Phone _____ Home Phone _____

E-Mail _____ Occupation _____

Married _____ Single _____ Divorced(What Year?) _____ Widow(er) _____

Children Names & Birthdates _____

Business Name _____ Business Type _____

Address _____ City _____ State _____ Zip _____

Business Phone _____ Business E-Mail _____

Current Questions/Concerns _____

(Please do not write below line)

Observations _____

Services Suggested Personal Tax Business Tax Other _____ Years _____

Issues _____ Fees Quoted _____

Interviewer G J K K Meeting date _____ Meeting time _____ 010322