

SCHULZ & ASSOCIATES - CONFIDENTIAL CLIENT INFORMATION

* Required Information

*Taxpayer's Name *SSN *Date of Birth
*Spouse's Name *SSN *Date of Birth
*Address
*City *State *Zip Code
*Cell Phone # Resident County
*Home Phone # School District County
Work Phone # School District Number
*Spouse Cell # *Email Address
Spouse Work # *Spouse Email Address

Preferred Contact #: Cell - Home - Work - Spouse Cell Tax Return Delivery: Pick up - Regular Mail - E-Mail

DEPENDENTS, (other than you and your spouse), CLAIMED ON YOUR TAX RETURN:

Table with 4 columns: *Relationship, *Name of Child, *Date Of Birth, *Social Security Number

*Business Name
*EIN: Date Business Started: Date Business Ended:
*Contact Person & Phone #
*Trust/Estate Name EIN
*Trustee/PR & Phone #
*Address: *City *State *Zip
FAX #:
For New Clients Only: Referred by:

Schulz & Associates Privacy Policy

CPAs, like all providers of personal financial services, are now required by law to inform their clients of their policies regarding privacy of client information.

Types of Nonpublic Personal Information We Collect

We collect nonpublic personal information about you that is provided to us by you or obtained by us with your authorization.

Parties to Whom We Disclose Information

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law.

Protecting the Confidentiality and Security of Current and Former Clients' Information

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines.

Please call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

Signature Date

Office Use Only: File # Accountant: Practice Setup File