

Potential New Client Questionnaire

Thank you for contacting Nelson Tax & Accounting, LLC. To determine if we are a good match for you, please answer the following questions and return this form to our office.

Name(s): _____

Address: _____

Phone Number: _____

Email: _____

Birth Date(s): _____

Occupation(s): _____

How did you hear about Nelson Tax & Accounting / Who referred you?

Have you filed all prior year tax returns? _____

Why are you changing accountants? _____

Do you have any immediate needs or concerns regarding your tax situation?

Do you receive, sell, send, or exchange any virtual currency/cryptocurrency?

Are you self-employed? _____

Do you have any rental property? _____

Do you have any foreign income, foreign accounts, or hold an interest in a foreign entity (excluding foreign investments held through a U.S.-based broker)?

Have you set up any trusts, are you the beneficiary of any trusts, or have you done any estate planning?

Return to: Nelson Tax & Accounting

sdaher@nelsontaxmn.com

1625 Radio Dr – Ste 140, Woodbury, MN 55125

651-455-4621

Please note that if you reach out to us about becoming a client between January 1 and April 15 (or applicable tax deadline), it will be necessary to extend your return.