



•Michael Conte CPA•

On Boarding for Tax Reports

NAME: _____

ADDRESS: _____

Contact Info:

Phone _____ Cell _____

E-Mail _____

Request Details

Business Taxes Yes No Personal Taxes Yes No

Name of State and Local municipalities: STATE _____

Municipality Name _____

Filed Last Year Yes No Filing Type Married HofH MFS Single

Number of Dependents _____ Number of W2s _____

Number of 1099s _____ Industry Description _____

Farm Income Yes No Rental Income Yes No

Any Corporations, Partnerships, or Brokerage Accounts Yes No

Cost of Last Years Returns \$ _____

Extension Needed Yes No

Previous Tax Preparer _____

Misc Information: _____

