



CLIENT INFORMATION FORM

(Confidential)

Name _____ Spouse _____

E-mail Address _____

Home address _____

Best contact phone number:

_____ Cell

DOB _____ SS# ____ - ____ - ____ DOB _____ SS# ____ - ____ - ____

Children? None

Name _____	DOB _____	SS# _____
Name _____	DOB _____	SS# _____
Name _____	DOB _____	SS# _____
Name _____	DOB _____	SS# _____

Employer _____ Self Employed Retired

Spouse Employer _____ Self Employed Retired

Which of our services are you interested in?

Income Tax (Personal)
 Income Tax (Business)
 Payroll Services (Business)

Financial Reports/Bookkeeping (Business)
 Investments

Other _____

How do you prefer to exchange documents with us?

- Email - I can scan and send, no need for paper.
- I can receive by email, but I will bring or mail paper documents to you.
- I would prefer to receive and send paper, please.

How did you hear about NEA Financial Services?

- Friend/family member Google/Web search Advertisement Dave Ramsey/ELP
- Other _____

Thank you – we appreciate your business!!