



FLEMING & CO., Certified Public Accountants

New Client - Appointment Request

Please print clearly

Client Information

Date _____

Primary Taxpayer _____ Marital Status _____

Address _____

City _____ State _____ Zip Code _____

Home Phone _____ Cell Phone _____

E-mail _____ Occupation _____

Referred by _____ Returning Client

Spouse _____

Cell Phone _____

E-mail _____ Occupation _____

Type of Appointment

- Meet & Greet (15-30 minutes get to know each other – **no tax advice given**)
- Tax Advice/Consultation
- Tax Prep Appointment

❖ *Type of Tax Appointment – mark all that apply* ❖

- Personal*
- Business (Schedule C- disregarded LLC)*
- Business (Corporate, S-Corp, Partnership, LLC)*
- Fiduciary/Trust*
- Gift*
- Exempt/Non-Profit*