



2023 Client Information Sheet

(Please Print)

DATE: _____ TIME: _____
 Which preparer are you scheduled with? _____ Are you a new client? YES NO

Name _____ Birthdate _____ SS# _____
 Driver License Number _____ Drive License Issue Date _____ Driver License Expiration Date _____
 Address _____ County _____
 City/State/Zip _____ Home Phone _____
 Email Address _____ Cellphone _____
 Occupation _____

Spouse _____ Birthdate _____ SS# _____
 Driver License Number _____ Drive License Issue Date _____ Driver License Expiration Date _____
 Email Address _____ Cellphone _____
 Spouse Occupation _____

Dependents:

Name _____ Birthdate _____ SS# _____
 Name _____ Birthdate _____ SS# _____
 Name _____ Birthdate _____ SS# _____
 Name _____ Birthdate _____ SS# _____

	YES	NO	
Are you self employed?			Name: _____
Farm or Small Business			
Do you own your home?			
Did you have daycare expense?			
Do you own Rental Property?			
Are you involved in any p-ships/corps/LLC's?			
Did you have Marketplace Insurance?			

	How many?
W-2's	
1099's	
1095's (Health Insurance)	

We appreciate your business!

We do not share your information. All information is used only by Studle Financial Services.
 We may contact you throughout the year to discuss financial planning.