



MICHIGAN CITY LOCATION
 123 EAST 8TH STREET, MICHIGAN CITY, IN 46360
 PHONE | 219.874.0210 FAX | 219.874.1137

VALPARAISO LOCATION
 150 WEST LINCOLNWAY, SUITE 3002, VALPARAISO, IN 46383
 PHONE | 219.615.0210

Prospective Client Information

Taxpayer Information	Spouse Information
-----------------------------	---------------------------

First/Last Name _____	_____
Phone _____	_____
Email _____	_____
Occupation _____	_____
Own a Business? <input type="checkbox"/> No <input type="checkbox"/> Yes <i>Name / Type</i> _____	
Tax Filing Current? <input type="checkbox"/> Yes <input type="checkbox"/> No Year Last Filed _____ <i>Taxpayer</i> _____ <i>Spouse</i> _____	
Referred By _____ <i>or...</i> How did you learn of our firm? _____	

Personal: Do you have...	Business: Do you have...
---------------------------------	---------------------------------

Investment / brokerage accounts or stocks (e*Trade, etc.)? _____	Sole Proprietorship? _____ C-Corp? _____ S-Corp? _____
Trust(s) or estate? _____	Partnership or LLC (<i>family-owned or with outside partners</i>)? _____

Personal: In the last year...	Business: In the last year ...
--------------------------------------	---------------------------------------

Received a tax notice from regulatory authority? _____	Received a tax notice from regulatory authority? _____
Filed for or experienced bankruptcy? _____	Filed for or experienced bankruptcy? _____

Personal: What services are you seeking?	Business: What services are you seeking?
---	---

Income Tax Preparation _____	Business Set-Up _____
Tax Planning / Projection _____	Income Tax Preparation / Tax Planning _____
Preparation of Estimated Payments _____	Financial Statements / Reporting _____
Consulting _____	Bookkeeping _____
Personal Financial Statement _____	Payroll Services _____
Nonresident Withholding _____	Consulting / Management Advisory _____
Preparation of Year-End Forms W-2, 1099 _____	Preparation of Year-End Forms W-2, 1099 _____
Retirement Planning _____	Business Valuation _____

Additional Notes

Fees are billed at our standard hourly rates based on the time required by the individuals assigned to the engagement, plus direct disbursements.

Standard hourly rates vary according to the degree of responsibility involved and the level of expertise required; hourly rates currently range from \$60 to \$240 per hour.