CLH EST. 1992 CPAs & CONSULTANTS

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

Date: _____

	Taxpayer Information	Spouse Information
First/Last Name		
Phone		
Email		
Occupation		

Own a Business? ____ *No* ____ *Yes* *Name / Type* _____

Tax Filing Current? ____ *Yes* ____ *No* **Year Last Filed** _____ *Taxpayer* _____ *Spouse*

Referred By _____ *Or...* **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 *(family-owned or with outside partners)*? ____

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

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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.