

Crystal Clear Tax Solutions Inc
"Helping you put the pieces together"
 17460 Shelley Ave, Sandy OR 503.563.7661

To our new client: Welcome to our family! Please fill out the information below. Feel free to leave any of the areas blank if you do not know the answer or want to talk about it first.

Client Name:	Spouse Name:	Date
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		Yes	No	N/A
1.	Are you, your spouse and dependents (if applicable) all U.S. citizens?			
2.	Has there been a recent divorce? If so, please bring a copy of the decree.			
3.	Do you have an up-to-date will?			
4.	Do you own any real estate in another state (other than Oregon)?			
5.	Are your beneficiary designations (if any) current?			
6.	Were any gift tax returns filed in prior years?			
	If yes, please bring in copies....or tell us where to get them.			
7.	Are you helping to support any of your parents or other relatives?			
8.	Do you have any "special needs" dependents?			
9.	Do you own any interest in a partnership, S Corporation or LLC?			
	If yes: Is a buy-sell agreement in place?			
10.	Are you the beneficiary or grantor of a trust?			
11.	Are you covered by an employer-provided tax favored retirement plan?			
13.	Do you have any unexercised stock options?			
14.	Are you paying or receiving alimony?			
16.	Have you ever sued a prior tax preparer?			
17.	Do you change tax preparers often?			
18.	Are you aware of any "questionable" items on your tax return?			
19.	Any recent or current IRS or state audits?			
20.	Do you have any unfiled tax returns?			
21.	Do you owe any unpaid income taxes (to the IRS or any state)?			
22.	Is there any pending or actual litigation against you?			
23.	Any other issues to discuss? (If so, list them below)			