NETO FINANCIAL GROUP INC.
ACCOUNTING, TAX, AND WEALTH ADVISORY

New Client Questionnaire

Name:			Spouse/ Partner:
Phone:			Phone:
Address:			Spouse/ Partner Email:
City:	State:	Zip:	Marital Status:
Date of Birth:			Date of Birth:
SSN:			SSN:
Occupation:			Occupation:
Dependent Information:			
Name:			Name:
Date of Birth:			Date of Birth:
SSN:			SSN:
Relationship:			Relationship:
Name:			Name:
Date of Birth:			Date of Birth:
SSN:			SSN:
Relationship:			Relationship:

Direct Deposit and Electronic Funds Withdrawal Account Information:
The IRS and certain states allow refunds to be deposited to and balances due to be paid directly from your financial institution. If you would like to receive your refund or pay a balance due electronically, complete the following information.

Would you like any refunds owed to you directly deposited? Yes _____ No ______
Would you like to pay any amount due on your **federal** return using electronic withdrawal? Yes _____ No ______
Would you like to pay any amount due on your **state** return(s) using electronic withdrawal? Yes _____ No ______
Would you like to pay your tax preparation invoice using this account information? Yes _____ No ______

Name of bank or financial institution: ________________________________

Routing Number ________________ Account Number _____________________

Type of Account: Checking _____ Savings _____

Name on Account: _______________________________________

I confirm that the bank account information and the direct deposit/electronic withdrawal options selected above are correct. _________ ________
Initials Initials

Please list any questions, comments, or concerns for the CPA here:

In a separate email, you will receive an invitation to upload all relevant documents into our secure portal, which may include:

- Copy of driver's license
- Prior Year Tax Returns
- This year's tax documents:
  - W-2's (wages)
  - 1099s (interest, dividends, retirement income, and investment transactions, & cost basis of securities sold
  - Form 1098 for mortgage interest, tuition, student loan interest, etc.
  - Closing statements pertaining to real estate transactions
  - Brokerage statements from stock, bond or other investment transactions to include cost basis for stocks, bonds and mutual funds sold during tax year
  - Schedule(s) K-1 (income/loss from partnerships, S Corporations, etc.0
  - Receipts or statements for charitable contributions of $250 or larger
  - Other supporting documents (schedules, checkbooks, etc.) for income, expenses, or deductions
  - In addition to these documents, please upload any tax notices you've received from the IRS or other tax authorities that pertain to the last two tax years.
  - Etc.

For your security, please do not email any documents containing personal information.

Did you know you can fill and sign forms anywhere? With Adobe mobile app, snap a picture, upload a form, fill it out, sign it, and send it from your phone or tablet. Click the below link to download on Google Play or App Store.

https://acrobat.adobe.com/us/en/mobile/fill-sign-pdfs.html