

New Client Questionnaire

Thank you for contacting Nelson Tax & Accounting, LLC. To determine if we are a good match for you, please answer the following questions and return to our office.

Name(s): _____

Address: _____

Phone Number: _____

Email: _____

How did you hear about Nelson Tax & Accounting / Who referred you?

Have you filed all prior year tax returns? _____

Why are you changing accountants? _____

Do you have any immediate needs or concerns regarding your tax situation?

Do you receive, sell, send, or exchange any virtual currency?

Are you self-employed? _____

Do you have rental property? _____

Return to: David Lindgren, CPA
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651-455-4621