



Morling & Company

We Maximize Your Financial Well-Being

Financial, Tax and Business Consulting Services

7049 Redwood Boulevard, Suite 205

Novato, CA 94945

Phone: 415-956-9500

Fax: 415-956-1856

Base Information

Date _____

Taxpayer First Name _____ Taxpayer Middle Name _____ Taxpayer Last Name _____

Taxpayer Company _____ Taxpayer Occupation _____ Taxpayer Industry/Specialty _____

Taxpayer Date of Birth _____ Spouse Date of Birth _____

Spouse's First Name _____ Spouse's Middle Name _____ Spouse's Last Name _____

Spouse's Company _____ Spouse's Occupation _____ Spouse's Industry/Specialty _____

Addresses

Street Address _____

City _____ State _____ Zip Code _____

Mailing Address (if different) _____

City _____ State _____ Zip Code _____

Contact Information

Mobile _____ Business _____ Home _____

Spouse's Mobile _____ Spouse's Business _____ Other _____ Extension _____

Email _____ Spouse's Email _____

Dependents

Name _____ Date of Birth _____ Name _____ Date of Birth _____

Name _____ Date of Birth _____ Name _____ Date of Birth _____

Yes No

- 1. Do you have capital gains or losses?
- 2. Do you have stock options?
- 3. Do you have un-reimbursed employee business expenses?
- 4. Do you have an office in your home?
- 5. Do you have any foreign income?
- 6. Do you have to file in states other than California?
- 7. Do you have rental property?
- 8. How did you hear about Morling & Company?

Referred By: _____

Internet Search: Google Yelp Yahoo Other: _____

Other: _____

- 9. Who prepared your prior-year tax return?

- 10. What are you looking for in a tax or financial advisor?

General Business Questions

(if Morling & Company will be providing professional services to your business, please request a Business Welcome Packet if you have not received one.)

- 11. Do you own a business? Yes No
- 12. If yes, when was it started: _____
- 13. Business type?
 Sole Proprietorship Corporation LLC
 Partnership Other _____
- 14. Purpose of Business: _____
- 15. Do you have a Retirement Plan?: Yes No
- 16. Type of Retirement Plan? (check all that apply)
 Profit-Sharing 401K Other _____
 SEP IRA
- 17. Please list any issues important to you or issues you would like to discuss in more detail.
 A. _____
 B. _____
 C. _____

General Personal Planning Questions

Yes No

- 18. Do you have a financial plan?
- 19. Do you have a will or living trust?
- 20. Do you personally manage your investments?
- 21. If no, who manages your investments?

- 22. Are you financially prepared for retirement?
- 23. What other financial planning issues are important to you?