



Client Information Sheet

Ledger Medial
Accounting Services
1 N. Main St.
Greenville, SC 29601

(864)655-7098
www.LedgerMedial.com

<u>Taxpayer</u>		<u>Spouse</u>	
Name	_____	Name	_____
Occupation	_____	Occupation	_____
SSN	_____	SSN	_____
DOB	_____	DOB	_____
Phone #	_____	Phone #	_____
Email	_____	Email	_____

Preferred method of communication

Current Address _____

City, State, Zip _____

County _____

Dependents

Legal Name	Birthdate	SSN#

Services Needed (check all that apply)

- | | | |
|-----------------|-----------------------------------|----------------------|
| Individual Tax | Monthly Bookkeeping | Payroll |
| Business Tax | Entity Registration (LLC, etc...) | Help with tax notice |
| Tax Planning | Business Advisory | QuickBooks Cleanup |
| Tax Projections | Sales Tax | Hospitality Tax |

How did you hear about us?

If **other**, will you please specify? _____

If **referred**, whom may we thank? _____

Are you behind on any income tax filings?

We are attempting to remain paperless as possible. **Do you need a paper copy of our product (tax return(s), financial statements, etc...)?**

*You can change this anytime, however a paper copy is \$20.

We are dedicated to operating as efficiently as possible in order to provide the maximum quality of service at the minimum possible price. **Are you willing to corresponding via electronic signature and document exchange using our secure online portal?**