



Rada & Associates
Accounting Services LLC.

Client Interview

Please complete this form before your appointment.

1. Personal Information

Name		Soc. Sec. No.	D.O.B.	Occupation	Phone Number
Taxpayer					
Spouse					
Street Address		City		State	ZIP
Email Address					

Blind	<u>Taxpayer</u> <input type="checkbox"/> Yes <input type="checkbox"/> No	<u>Spouse</u> <input type="checkbox"/> Yes <input type="checkbox"/> No	<u>Marital Status</u> <input type="checkbox"/> Married	<u>Will File Jointly?</u> <input type="checkbox"/> Yes <input type="checkbox"/> No
Disabled	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Single	
Pres. Campaign Fund	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Widow(er), Date of death : _____	

2. Dependents (Children and Others)

<u>Name (First, Last)</u>	<u>Relationship</u>	<u>D.O.B.</u>	<u>Soc. Sec. No.</u>	<u>Months Lived with you</u>	<u>Disabled</u>	<u>Full Time Student</u>	<u>Dependent's Gross Income</u>

3. Basic Questions

Please answer the following questions:

- | | | | |
|---|---|--|--|
| 1. Are you self-employed or do you receive hobby income? | <input type="checkbox"/> Yes* <input type="checkbox"/> No | 6. Did you go through bankruptcy proceedings? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 2. Did you receive income from raising animals or crops? | <input type="checkbox"/> Yes* <input type="checkbox"/> No | 7. Did you pay rent? If so, how much? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 3. Did you receive rent from real estate or other property? | <input type="checkbox"/> Yes* <input type="checkbox"/> No | 7A. If rent was paid, was heat included? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 4. Did you receive income from gravel, timber, minerals, oil, gas, copyrights, patents? | <input type="checkbox"/> Yes* <input type="checkbox"/> No | 8. Did you pay interest on a student loan for yourself, spouse, or dependent during the year? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 5. Did you withdraw or write checks from a mutual fund? | <input type="checkbox"/> Yes <input type="checkbox"/> No | 9. Did you pay expenses for yourself, spouse or dependent to attend school beyond high school? | <input type="checkbox"/> Yes <input type="checkbox"/> No |

