

**Charles K. Pike & Associates**  
**Tax and Financial Services**

*New Client Worksheet*

Please provide the following information. Thank you.

Name	Relation *	SS#	Date of Birth	Age

\*Taxpayer (T), Spouse (SP), Son (S), Daughter (D)

Occupation:

Taxpayer: \_\_\_\_\_ Spouse: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_

County: \_\_\_\_\_ School District: \_\_\_\_\_

Home #: \_\_\_\_\_ Work #: \_\_\_\_\_ Cell #: \_\_\_\_\_

E-Mail Address (optional): \_\_\_\_\_

**\*New\* We need your Driver's License!**

We offer *Retirement Planning*....

Would you like a retirement account review? \_\_\_\_\_

Need 401K advice? \_\_\_\_\_

Please furnish any information, comments, or questions that you feel will be applicable to preparing your tax returns this year \_\_\_\_\_

\_\_\_\_\_