

NEW AND PROSPECTIVE CLIENT WORKSHEET

ODDO CPAS

819 Redwine Road
Fayetteville, GA 30215

620 Peachtree St, NE #120
Atlanta, GA 30308

(770) 461 – 7627

irsgoaway@aol.com

Personal Returns – FORM 1040 Only

Date: _____

Client#: _____

Individual Name: _____

Spouse: _____

SSN# _____

SSN# _____

d/o/b _____

d/o/b _____

Address _____

Address _____

Telephone:(H) _____ (O) _____ (Cell) _____

Email: _____

Do you check email daily: _____

Preliminary Questions:

1. Are you current with your tax returns?__: What years are still open?_____
(We require a retainer of \$295.00 per year on each individual return that is open if more than just the most recent year is still open.)
2. Do you have and delinquent notices from the IRS or state of GA?
3. Are there any deadlines that you have?_____

I am leaving my previous accountant because: [] their fees were too high, [] the work was not done timely, [] other. Explain here

Preferred method for:

Please circle your choice

Tax Returns	E-File	TRADITIONAL (Paper File)
Invoice	Email	Reg Mail
Correspondence	Email	Reg Mail

How did you hear of us? or referred by? _____

Other comments:

Schedule of Service Fees:

- * Tax consultation or Tax appointment with Paul C. Oddo, Jr. is \$125 per hour.
- * Tax work preparation is, on average, \$95 per hour.
- * Individual returns average around \$295 per return (or greater depending on the complexity of the return).
- * Corporations, Partnerships, Limited Liability Company (LLC), Sole-Proprietor, Estate, Trust, or Non-profit returns are on average \$600 per return (or greater depending on the complexity of the return).
- * Bookkeeping and other services is, on average, \$65-\$85 per hour.
- **Past due individual tax return preparation requires a \$295 retainer per return. Please provide a check or cash at the time of your appointment.

Client Signature: _____ **Prepared by:** _____