



APEXVISION

TAX AND ACCOUNTING SOLUTIONS

550 S. Watters Road STE 278
Allen, TX 75013
(214) 415-8679 Fax (877) 703-9181

Individual Income Tax Client Information

Date _____

Taxpayer Information

First/Middle/Last Name: _____

Maiden Name _____

SSN _____

DL # _____

DOB _____

Occupation _____

Email Address _____

Cell Phone _____

Pager _____

Work Phone _____

Work Fax _____

Address _____

City/State/Zip _____

Dependent(s) _____

Spouse Information

First/Middle/Last Name: _____

Maiden Name _____

SSN _____

DL # _____

DOB _____

Occupation _____

Email Address _____

Cell Phone _____

Pager _____

Work Phone _____

Work Fax _____

Home Phone _____

Home Fax _____

SSN _____ DOB _____

SSN _____ DOB _____

SSN _____ DOB _____

SSN _____ DOB _____

My Current Assets Are

____ Retirement Accounts (i.e. 401(K), IRA)

____ Own a home

____ Own other properties

____ Own equipment for my business

____ Current Portfolio __ +25K __ +50K __ +100K

____ Current Cash Flow Business

____ Ownership in other privately held companies

____ Shareholder in other privately held companies

My Goals for Working with Apexvision, LLC Are

____ Reducing our tax burden

____ Investing in stocks, bonds, mutual funds, REITS

____ Relieving tax issues related to real estate & rental

____ Tax consequences of marriage, divorce, children

____ Asset Protection and Estate Planning

____ Increase cash flow & become debt free

____ IRS Representation

How did you hear about us?

____ Referral-Whom may we thank? _____

____ Newspaper/circular-which one? _____

____ Other-Please specify _____

Total Assets \$ _____

Total Liabilities \$ _____

Net Worth \$ _____

Attorney's Name _____ **Accountant's Name** _____

Attorney's Number _____ **Accountant's Number** _____

REQUIRED ONLY FOR LOAN APPLICATIONS:

I (we) hereby affirm that the information contained in this application is true, complete and correct and that Apexvision Tax and Accounting Solutions is relying on this information. Apexvision Tax and Accounting Solutions is authorized to make any investigation of my/our credit and/or employment status either directly or through any agency employed by Apexvision Tax and Accounting Solutions. Apexvision Tax and Accounting Solutions may disclose to any other interested parties Apexvision Tax and Accounting Solutions experiences with my loan account. This information may be kept even if no loans are made.

Date _____

Applicant Signature _____

Date _____

Co-Applicant Signature _____

For OFFICE USE ONLY

Status

Class

____ A ____ I _____ 1 _____ 2 _____ 3

Estimated Tax Payments ____ Yes ____ No

Investments ____ Yes ____ No ____ Maybe Loan/Mortgage ____ Yes ____ No

Compliance ____ Yes ____ No

Debt Settlement/Negotiation ____ Yes ____ No Tax Preparation ____ Yes ____ No

Bankruptcy ____ Yes ____ No