

New Client Application Packet

Thank you for considering Kuhl, Phillips, & Jans, Inc.

- Please bring the following to KPJ for our review: 2401 Coral Ct., Ste. 2, Coralville, IA
 - the completed New Client Application (attached) and
 - a copy of your prior year tax return (Federal & State) with applicable Depreciation schedules

KPJ will review the information to determine if we will be able to fulfill your service needs. If KPJ determines that we can help you, we will contact you and indicate such. KPJ will keep and enter your prior returns into our tax system so that you will receive an organizer packet for the upcoming tax returns and to account for any prior year tax return information that is required to be carried over to the upcoming tax return. There will be a fee for this onboarding process. This fee will be billed at our hourly professional rate with a minimum of \$150. If, after reviewing the return, it is determined that KPJ will not be able to offer services to you, you will be contacted, your copy provided will be shredded and you will not be charged any fees.

KPJ Privacy Policy

Your non-public personal information is collected from various sources: information received from you on tax organizers, worksheets, client questionnaires, applications, financial documentation, interviews, telephone conversations, faxes, and emails.

KPJ does not sell your personal and confidential information to outside parties. KPJ will not disclose your personal and confidential information to any outside party without your express written permission, which includes re-sending copies of tax returns sent directly to third parties.

Physical security, electronic security safe-guards and strict procedural measures consistent with federal standards are in place to protect your non-public personal information.

Contact Information *(please print clearly)*

	Taxpayer <i>(first & last)</i>	Spouse <i>(first & last)</i>
Name:		
Address:		
Cell Phone:		
SSN		
Birth Date		
Home Phone:		
Work Phone:		
Email Address:		

