



W. L. BENJAMIN

Public Accountant & Tax Consultant

735 BLUE HILLS AVENUE
BLOOMFIELD, CONNECTICUT 06002
(860) 242-0378 FAX (860) 242-6383 • E-Mail wbctfs@snet.net

NEW CLIENT FORM

CLIENT INFORMATION

NAME: _____

CONTACT: _____ EMAIL: _____

PHONE: _____ MOBILE: _____ FAX: _____

CLIENT ADDRESS

ADDRESS: _____

CITY: _____

STATE: _____

ZIP CODE: _____

SOFTWARE

Do you use a ledger or a computer to record transactions? _____

What type of accounting software do you presently use? _____

Do you have a Financial Advisor? _____

Do you have an accountant to prepare your taxes? _____

What method of accounting using? _____

INDUSTRY

CONTRACTOR

MANUFACTURING

NON-PROFIT

PROPERTY MANAGEMENT

RETAIL

REAL ESTATE

SALES

SERVICE

WHOLESALE

OTHER SPECIFY _____

SERVICES OFFERED

BOOKKEEPING

DATA ENTRY

MONTHLY

PAYROLL

QUATERLY

QUICKBOOKS

SET-UP COMPANY

TAXES

OTHER, SPECIFY _____