ANDERSON
LEGAL, BUSINESS & TAX ADVISORS

2 YEAR TAX REVIEW & PLANNING INTAKE SHEET

CLIENT INFORMATION

Today's Date: ____ Location: ____

First Name: ____ Middle: ____

Last Name: ____

Gender: ○ Male ○ Female

Marital Status: ____

Spouse Name: ____

Gender: ○ Male ○ Female

Street Address: ____

City: ____ State: ____

Zip: ____ County: ____

Profession: ____

Phone: (Best to Reach You During the Day) ____ Email: ____

INVESTING INFORMATION

Current Investment Focus: (*Mark all that apply*.)

- ☐ Rental Real Estate
- ☐ Fix & Flip / Wholesale
- ☐ Commercial
- ☐ Tax Liens / Deeds
- ☐ Private Lender / Notes
- ☐ Lease Option

States Where You Currently Invest: ____

How many properties do you currently own? [ ] Are all these properties protected? [ ]

GENERAL INFORMATION

Existing Entities: (*Mark all that apply*.)

☐ "C" Corporation ☐ "S" Corporation ☐ Land Trust ☐ LLC
☐ Living Trust ☐ LP

Do you invest in real estate through a self directed IRA? [ ]

Are you behind on filing any tax returns? [ ] If Yes, which year(s): [ ]

Which tax years do you wish us to review? [ ]

When is the best time to schedule your tax review? [ ]

To initiate your 2 year tax review please provide us with your last 2 filed 1040 personal income tax returns. Upon receipt of your tax returns one of our assistants will contact you within 7 days to schedule your review time with one of our tax professionals. Consultations usually take between 45 to 90 minutes to complete depending on the complexity of your return.

Please save and submit form via email at:

coordinators@andersonadvisors.com

or you can our upload it to our secure server at:
https://andersonadvisors.com/upload-documents/

You may also print out the document and fax it to us at:
702.664.0547