

2 Year Tax Review & Planning Intake Sheet



Today's Date:

Location:

Washington
732 Broadway, Suite 201
Tacoma, WA 98402
Fax: 253.238.0003

Nevada
3225 McLeod Drive
Las Vegas, NV 89121
Fax: 702.664.0549

800.706.4741
www.andersonadvisors.com

YOUR NAME

First Name: Middle Initial:

Last Name:

Suffix:

ADDRESS

Street Address: Apt or Unit:

City:

State: ZIP:

County:

PERSONAL INFORMATION

Date of Birth: Gender: Male Female

Preferred Phone: Profession:

Email:

MARITAL STATUS

Are you Married? Yes No

If Yes, Name of Spouse:

First Name: Middle Initial:

Last Name:

Suffix: Gender: Male Female

INVESTING INFORMATION

Current Investment Focus: (Mark all that apply.)

- | | |
|---|---|
| <input type="checkbox"/> Rental Real Estate | <input type="checkbox"/> Tax Liens / Deeds |
| <input type="checkbox"/> Fix & Flip / Wholesale | <input type="checkbox"/> Private Lender / Notes |
| <input type="checkbox"/> Commercial | <input type="checkbox"/> Lease Option |

States Where You Currently Invest:

INVESTING INFORMATION (CONTINUED)

How Many Properties do you currently own:

Are all these properties protected? Yes No

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? Yes No

Are you behind on filing any tax returns? Yes No

If Yes, which year(s):

Which tax years do you wish us to review?

When is the best time to schedule your tax review?

INCLUDE DOCUMENTS

To initiate your 2 Year Tax Review please provide us with your last two filed 1040 personal income tax returns. Upon receipt of your tax returns, one of our assistants will contact you within seven 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 and tax documents:

Upload to your Online Secure Vault:	Email to:	Fax to:
andersonadvisors.com/ upload-documents/	coordinators@ andersonadvisors.com	702.644.0547

