



# KOHLER & EYRE

CERTIFIED PUBLIC ACCOUNTANTS

MARK J. KOHLER, CPA \*†‡¥  
LADELL J. EYRE, CPA \*  
BRIAN K. BROWN, CPA \*†  
RICHARD E. TAYLOR, CPA \*

1883 W. ROYAL HUNTE DRIVE, SUITE 201  
CEDAR CITY, UTAH 84720  
PH. (435) 865-5866  
FAX. (800) 948-8030

\*A PROFESSIONAL CORPORATION  
‡ ALSO ADMITTED IN ARIZONA  
† ADMITTED IN CALIFORNIA  
¥ ADMITTED IN IDAHO

## NEW CLIENT QUESTIONNAIRE

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

1. How did you hear about our firm? \_\_\_\_\_

2. What is your occupation or business? Do you have multiple sources of income?  
\_\_\_\_\_  
\_\_\_\_\_

3. In regards to your tax return, what is the most important thing to you? (More than one may apply)

- Fee/Price     Quality Work     Timeliness     CPA Relationship

4. Please list your Entities or Businesses

Business Name	Type of Entity	Years in Business

5. Do you have rental properties? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

6. What type of software do you use for bookkeeping?

---

---

7. What long-term objectives do you want to achieve in working with Kohler & Eyre CPA's?

---

---

8. Is your business currently growing and what has been its average income over the past 3 years?

---

---

9. How often would you like to speak with your Personal Tax Consultant on a paid consultation?

---

---

10. Are you willing to file an extension? If your answer is no, why?

---

---

11. What is your average adjusted gross income (AGI) over the last 3 years? \_\_\_\_\_

12. What is your preference for communication with us?

Phone       Email       In Person/Meetings

13. What expertise do you feel is vital for us to meet your needs?

---

---

---