

# Lanier, Deal, & Deal, CPAs

## Client Intake Form

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

Mailing Address: \_\_\_\_\_

**Primary Email Address:** \_\_\_\_\_

**Spouse Email Address:** \_\_\_\_\_

Phone Number(s): \_\_\_\_\_

**Digital copies of returns via email will be our default delivery method. If you would like a hard copy or no copy, please indicate below:**

\_\_\_\_\_ Hard copy

\_\_\_\_\_ None

*\*\*Digital copies of returns are always available per request\*\**

**If you have balances due, please indicate your payment preference:**

\_\_\_\_\_ Drafted Balances Due (Electronic Payment)

\_\_\_\_\_ Voucher for Balances Due (Pay by Check)

**If you indicated electronic payment for balances due and/or would like to receive any refunds via direct deposit, please provide banking information below. Failure to provide this information will result in the need to mail in payment vouchers and/or receive refunds via mail.**

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

Routing Number \_\_\_\_\_

Account Number: \_\_\_\_\_

Account Type: \_\_\_\_\_ Checking \_\_\_\_\_ Savings

*\*\*Any hard copies of returns (if requested) or original documents provided by client that are not picked up in a timely manner, will be mailed to client at client's expense.\*\**

Signature \_\_\_\_\_ Date \_\_\_\_\_