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*Prospective Client Information Worksheet*

	<b>Taxpayer</b>	<b>Spouse</b>
Last Name		
First Name & Initial		
Occupation		
Phone		
Mailing Address		
City, State, Zip		

Please complete and return this prospective client information worksheet and return to [shelia@austinareatax.com](mailto:shelia@austinareatax.com). Once you've returned the worksheet, you will receive an email invitation to join the client SmartVault. Please accept this invitation to initiate your access to the secure client vault where you can upload your tax information.

*Please provide the following securely via the SmartVault.*  
Copy of last filed tax return