

POTENTIAL NEW CLIENT INFORMATION

Taxpayer Legal Name

Spouse Legal Name

Taxpayer Preferred Name (if different)

Spouse Preferred Name (if different)

Occupation

Occupation

Date of Birth

Date of Birth

Cell Phone Number

Cell Phone Number

Home or Business Phone Number

Home or Business Phone Number

Email Address

Email Address

Address City State Zip code

How were you referred to me? _____

Dependents

Name Date of Birth Relationship

Upon acceptance of our professional relationship, please provide copies of driver's licenses for the taxpayer and spouse, copies of Social Security cards for all family members to be reported on the tax returns, and copies of documents with dates of birth for all dependents (birth certificate, etc.).

I acknowledge receiving a copy of the Privacy Policy of Paul Gonzalez, CPA

Name

Date

Privacy Policy of Paul Gonzalez, CPA As Required by Law

Certified Public Accountants (CPAs), like all other providers of personal financial services are required by law to inform their clients of their policies regarding privacy of client information. CPAs have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. I know that you have confidence in my ability to perform the services requested by you; however, equally important to me is your confidence in knowing that all your personal information is safe.

Types of Nonpublic Personal Information I Collect

I collect nonpublic personal information about you that is provided to me by you or obtained by me with your authorization, including:

1. Information provided directly from you to me.
2. Information regarding the services I provide or have previously provided to you.
3. Information from third parties provided to me in connection with the services I provide to you.

This information may have been received in any manner, including emails, other electronic correspondence, in-person meetings, telephone and cell phone conversations, text messages, facsimile transmission, or other written or verbal communications.

Parties to Whom I Disclose Information

For current and former clients, I restrict access to Nonpublic Personal Information about you to those employees and other parties who must use that information to provide services to you. Their right to further disclose and use the information is limited by my employee code of conduct, applicable law, my Comprehensive Written Information Security Program, and my Code of Professional Conduct and nondisclosure agreements where appropriate.

Confidentiality and Security of Nonpublic Personal Information

I retain records relating to professional services that I provide so that I am better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. I also maintain physical, electronic, and procedural safeguards in compliance with applicable laws and regulations to guard your Nonpublic Personal Information.

You may request a notice disclosing the categories of personal information I have shared with third parties, for the third parties' direct marketing purposes, during the preceding calendar year. You may also request that I remove content or information that you have posted to my website, Facebook or LinkedIn pages, or other online services.

I will continue to adhere to the policies and practices described in this Privacy Notice with respect to information that I have acquired about you even if I no longer provide services to you. I reserve the right to change these policies and practices at any time. When appropriate, a revised Privacy Notice will be provided to current clients which incorporates such changes.

Because of these rules I am not able to provide copies of income tax returns to lenders and other third parties who may need a copy of your tax return if I have not received a proper disclosure form from you.