



New Client Information

Taxpayer Info

Full Name (as stated on US social security card): _____

Social Security Number: _____

Birth Date (mm/dd/yyyy): _____

Occupation: _____

Are you a US citizen or a Green Card holder: Yes: _____ No: _____

Country(ies) of citizenship: _____

Date of moving out of the U.S. (mm/dd/yyyy): _____

Date registered in Switzerland (mm/dd/yyyy): _____

Permit acquired upon moving to Switzerland: _____

Current Swiss permit status: _____

Spouse Info

Full Name (as stated on US social security card): _____

Social Security Number: _____

Birth Date (mm/dd/yyyy): _____

Occupation: _____

Is he/she a US citizen or a Green Card holder: Yes: _____ No: _____

Country(ies) of citizenship: _____

Date of moving out of the U.S. (mm/dd/yyyy): _____

Date registered in Switzerland (mm/dd/yyyy): _____

Permit acquired upon moving to Switzerland: _____

Current Swiss permit status: _____

Address of primary home: _____

Address of secondary home: _____

Telephone number to be listed on US tax return: 1. _____ 2. _____ 3. _____

1. Home _____

2. Taxpayer mobile _____

3. Spouse mobile _____

Email address: _____



Dependent 1 Info

Full Name (as stated on US social security card): _____

Social Security Number: _____

Birth Date: _____ Male: Female:

Did dependent live in your primary home for at least 6 months of the year? Yes: No:

Dependent 2 Info

Full Name (as stated on US social security card): _____

Social Security Number: _____

Birth Date: _____ Male: Female:

Did dependent live in your primary home for at least 6 months of the year? Yes: No:

Dependent 3 Info

Full Name (as stated on US social security card): _____

Social Security Number: _____

Birth Date: _____ Male: Female:

Did dependent live in your primary home for at least 6 months of the year? Yes: No:

Dependent 4 Info

Full Name (as stated on US social security card): _____

Social Security Number: _____

Birth Date: _____ Male: Female:

Did dependent live in your primary home for at least 6 months of the year? Yes: No: