# Questionnaire Form

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| --- | --- | --- | --- | --- | --- |
| First Name : |  | Last |  | Date |  |

|  |  |
| --- | --- |
| Address: |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Email : |  | Phone : |  |

|  |  |
| --- | --- |
| Interest: |  |
| Beginner:  Intermediate:  Expert : |  |

|  |  |
| --- | --- |
| Do You have a EFIN? |  |
| Do You have a PTIN? |  |

|  |  |
| --- | --- |
| Previous Software If Any? |  |
| Previous Bank Product If Any ? |  |

|  |  |
| --- | --- |
| Previous year Returns completed If Any? |  |
| How Did You Hear About Us ? |  |

## Comments / Questions