



Palermo, Landsman & Ross, P.A.

Client Data Sheet

9720 Stirling Road Suite 203 Cooper

City, FL 33024

PLRCPAs.com (954) 252-9622

Yes or No

Do you Own an LLC or Corporation?

Taxpayer

Spouse

Last name _____

First name _____

Middle Initial _____

Social Security # _____

Date of Birth _____

IP PIN _____

Work phone/ext _____

Cell Phone _____

Occupation _____

Email Address _____

Address _____

City & State _____

Last name _____

First name _____

Middle Initial _____

Social Security # _____

Date of Birth _____

IP PIN _____

Work phone/ext _____

Cell Phone _____

Occupation _____

Home Phone _____

Apartment _____

Zip Code _____

Dependents

Dependents

Last name _____

First name _____

Middle Initial _____

Relationship _____

Social Security # _____

Date of Birth _____

IP PIN _____

Last name _____

First name _____

Middle Initial _____

Relationship _____

Social Security # _____

Date of Birth _____

IP PIN _____

Last name _____

First name _____

Middle Initial _____

Relationship _____

Social Security # _____

Date of Birth _____

IP PIN _____

Last name _____

First name _____

Middle Initial _____

Relationship _____

Social Security # _____

Date of Birth _____

IP PIN _____

Below for Office Use Only

Manila: Prsl

Red: Payroll

Green: Financials

Enter Information in ALL Areas

Blue: Tax File

Orange: Notices

Yellow: Correspondence

Client Log

QuickBooks

Pro-Series