

OFFICE USE ONLY	Appointment	Notes
Date Called: _____	Date: _____ With: _____	_____
Date Organizer Sent: _____	Time: _____ Where: _____	_____
Type of Tax Client: _____		

MUMM & ASSOCIATES, P.C.

Certified Public Accountants

4949 North 26th Street, Suite A Lincoln, NE 68521
 Phone: (402) 438-6866 (800) 581-4216 Fax: (402) 438-6887
 webmaster@mumm-cpas.com

Note: Mumm & Associates, P.C. does not buy, sell or redistribute your information. All information obtained through this questionnaire will be used for internal use only. ***Required**

Best person to contact to communicate updates and reminders *

If "other" box is checked, please provide required information in the additional comments

- Taxpayer
 Spouse
 Other

Preferred method of contact *

Select the best two methods of contact

- Text Message
 Call Mobile Phone
 Other _____
 Email
 Call Home Phone

Taxpayer **

Spouse **

First Name *		
Last Name *		
Current Street Address *		
Current City/ State/ Zip Code *		
Mobile Phone *		
Email *		

**** This information may be shared with your spouse. If this creates a concern, please contact our office at (402)-438-6866**

Do you wish to receive communication from Mumm & Associates via text message? *

By opting-in you will receive text message communications from Mumm & Associates, P.C. At any point you can reply STOP to terminate communications from Mumm & Associates, P.C. We will not share, resell, or redistribute your information. This texting message is solely for business communications from Mumm & Associates, P.C.

- Opt-In
 Opt-Out

(Continued on Back)

Who Is your mobile phone provider?

If you opt-in to receive communication from Mumm & Associates, P.C. via text message, we will need this information

- Verizon
- Sprint
- USCellular
- AT & T
- Spouse has different mobile phone provider (list in other)
- Other: _____

How would you prefer to receive your tax organizer? *

Our clients are able to receive & send documents through their secure, personal login on our website; referred to as our *client portal*.

- I wish to receive my tax organizer through my client portal on Mumm & Associates, P.C.'s website
- I wish to fill out a blank tax organizer on Mumm & Associates, P.C.'s new website (This will not contain your prior year information)

What features or information would you find useful to have on our website?

Referred By: _____ How did you hear about us? _____

Additional Comments

We welcome the opportunity to be of service to you. Please stay tuned for more detail on our updated website. We look forward to receiving your completed information sheet.

Sincerely,

**MUMM & ASSOCIATES, P.C.
CERTIFIED PUBLIC ACCOUNTANTS**

This Form was Completed By:

Related Persons or Business

Client Signature

Date