



**PADGETT**  
THE SMALL BIZ PROS

**PADGETT PRACTICE INDIVIDUAL SET-UP FORM**

Date \_\_\_\_\_

Name \_\_\_\_\_

Spouse Name \_\_\_\_\_

SS# \_\_\_\_\_

Spouse SS# \_\_\_\_\_

Driver's License # \_\_\_\_\_

Driver's License # \_\_\_\_\_

DOB \_\_\_\_\_

DOB \_\_\_\_\_

Email address \_\_\_\_\_

Email address \_\_\_\_\_

Home Address \_\_\_\_\_  
City \_\_\_\_\_  
State \_\_\_\_\_  
Zip \_\_\_\_\_  
Phone \_\_\_\_\_

Year Last Tax Return Completed  
\_\_\_\_\_

Employer Name \_\_\_\_\_

Spouse Employer Name \_\_\_\_\_

Address \_\_\_\_\_  
City \_\_\_\_\_  
Zip \_\_\_\_\_  
Phone \_\_\_\_\_

Address \_\_\_\_\_  
City \_\_\_\_\_  
Zip \_\_\_\_\_  
Phone \_\_\_\_\_

	Children's Name	Age	DOB	SS#
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____
4.	_____	_____	_____	_____

Referred by: \_\_\_\_\_

\*\*\*\*\* PADGETT USE ONLY \*\*\*\*\*

CLIENT ID	_____	PRODUCT ID'S	_____
PRACTICE	_____	_____	_____
MAIL CHIMP	_____	_____	_____
CYMA	_____	_____	_____
E-MAIL	_____	_____	_____
ULTRA TAX	_____	_____	_____