

(the) GREAT WESTERN CLOUD.com

Post Office Box 70 ~ Safford, Arizona 85548

501-476-0029

APPLICATION FOR FREE CONSULTATION

Please know this fact in law: all client-attorney communications, in any form, are extremely confidential and not allowed to be disclosed to any source. Your information will never be “on line” or disclosed to the IRS.

Name: \_\_\_\_\_ Spouse’s Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

E-mail address: \_\_\_\_\_

Cell Phone # \_\_\_\_\_ Other phone \_\_\_\_\_

\_\_\_\_\_

(Inc. Tax Related Questions)

Are you current with your IRS tax filings? Yes \_\_\_ No \_\_\_

Did you take the standard deduction last year: Yes \_\_\_ No \_\_\_

How many dependants do you claim \_\_\_\_\_

Your 2024 tax amount paid or withheld: \$ \_\_\_\_\_

Amount of IRS refund rec’d if any \$ \_\_\_\_\_

Are there any outstanding IRS liens recorded against you: Yes \_\_\_ No \_\_\_

Your mortgage balance: \$ \_\_\_\_\_ Your monthly payment \$ \_\_\_\_\_

Do you own a second home or vacation home: Yes \_\_\_\_\_ No \_\_\_\_\_

Do you own any rental properties: Yes \_\_\_ No \_\_\_

Do you own any horses or livestock: Yes \_\_\_ No \_\_\_

Your vehicles: describe cars, P.U. trucks, R.V., Camper trailer, M/C, other

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Are you facing a large capital gain tax this year? Yes \_\_\_ No \_\_\_

Have you suffered a major financial loss recently? Yes \_\_\_ No \_\_\_

Are you suffering large unpaid medical-hospital bills? Yes \_\_\_ No \_\_\_

Your Profession and age: \_\_\_\_\_ \*

Spouse's Profession and age \_\_\_\_\_ \*

Who prepared your last IRS income tax return? \_\_\_\_\_

\* (One incredible benefit if you are a senior citizen)

For example: if you had recently inherited a large amount of capital, (or won the lottery) and always wanted to open your own business.....describe what that business would be.....in other words, what is your passion; golf, pilot's license, big game hunter & guide, music, publishing ? ? ? ? ?