



RUIZ FINANCIAL SOLUTIONS
Providing Bookkeeping, Financial Consulting & Tax Preparation Services

Client Information Questionnaire

(Please answer all questions completely and provide requested documentation to facilitate preparation or proposal.)

Date: _____

Name: _____ Spouse Name: _____

Date of Birth: _____ Spouse Date of Birth: _____

Occupation: _____ Spouse Occupation: _____

Address: _____ City, State, Zip: _____

Phone Number: (____) _____ Spouse Phone Number: (____) _____

Fax Number: _____

Email: _____

How did you hear about us? _____

Thank you for joining the RFS Family. We want to stay connected to the people that matter most to us. Please share your social media information with us so we can request, like, share, and follow you. Follow & like us back to stay connected with news, updates, and promotions.

Twitter: _____

Instagram: _____

Facebook: _____

Linked In: _____

Additional Notes: