



FLEMING & CO., Certified Public Accountants

# New Client Form (Trust)

*We would like to take this opportunity to welcome you as a new client and to thank you for your business. We look forward to being of service to you, now and in the future.*

**Please print clearly**

Date \_\_\_\_\_

Name of Trust \_\_\_\_\_

What type of trust do you have?    Probate \_\_\_\_\_    Living Trust \_\_\_\_\_    Other (CRT, etc.) \_\_\_\_\_

Federal ID Number \_\_\_\_\_

Main Contact Person \_\_\_\_\_ Title \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Social Security # \_\_\_\_\_ Cell Phone \_\_\_\_\_

E-mail \_\_\_\_\_

Preferred method of contact?    Email \_\_\_\_\_    Call \_\_\_\_\_    Both \_\_\_\_\_    No Preference \_\_\_\_\_

Are you a returning client?    Yes \_\_\_\_\_    No \_\_\_\_\_    Referred by \_\_\_\_\_

Secondary/Emergency Contact Person \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Cell Phone \_\_\_\_\_ E-mail \_\_\_\_\_

# BENEFICIARY INFORMATION

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Beneficiary \_\_\_\_\_ Date of Birth \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Social Security # \_\_\_\_\_ Beneficial Interest \_\_\_\_\_%

Beneficiary \_\_\_\_\_ Date of Birth \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Social Security # \_\_\_\_\_ Beneficial Interest \_\_\_\_\_%

Beneficiary \_\_\_\_\_ Date of Birth \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Social Security # \_\_\_\_\_ Beneficial Interest \_\_\_\_\_%

Beneficiary \_\_\_\_\_ Date of Birth \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Social Security # \_\_\_\_\_ Beneficial Interest \_\_\_\_\_%

*We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. To guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.*