

# Groen, CPA LLC

## PRE-CONSULT INTAKE

*Thank you for booking a consult. This short form takes about three minutes and helps us prepare so we can spend our 15 minutes together on the questions that matter to you.*

### Contact

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Full name: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

City & state (if outside Iowa): \_\_\_\_\_

### What brings you in

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*Which services are you considering? Check all that apply.*

- ☐ Individual tax return (1040)
- ☐ Self-employed / 1099 (Schedule C)
- ☐ Small business return (S-Corp 1120-S or partnership 1065)
- ☐ Bookkeeping (monthly)
- ☐ Tax planning or advisory
- ☐ IRS notice or letter response
- ☐ Other — please describe below

### Your situation

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Do you currently work with a CPA or tax preparer? ☐ Yes ☐ No

Do you own rental property? ☐ Yes ☐ No

Are you self-employed or have 1099 income? ☐ Yes ☐ No

Do you own a business entity (S-Corp, LLC, partnership)? ☐ Yes ☐ No

Do you have K-1s from other entities? ☐ Yes ☐ No

Do you have investment activity beyond retirement accounts (crypto, real estate, stock trading)?  
☐ Yes ☐ No

### The questions you want answered

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*What are the top one or two things you'd like to leave the call knowing? Answering here helps us come prepared with real numbers, not generalities.*

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### How did you find us?

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