2B's INC
TAX & FINANCIAL SERVICES

Client Financial Information

The following information is confidential and exclusively for the internal use of 2B's INC Tax & Financial Services and will never be released without your expressed permission. We find this information is helpful in determining what areas of our services will be helpful for each client's individual needs. Each year the federal government makes changes to tax and investing laws that need to be addressed with nearly every client. We will use this information to assess if there is anything new that you need to be aware of. As a tax and financial firm, we have a responsibility to not only provide you with the most accurate tax preparation but to advise you of possible financial situations that could create problems for you now or in the future.

Date: ___________________

Taxpayer		Taxpayer's Spouse (If Applicable)	
Name:	______________________	Name:	______________________
Date of Birth:	______________________	Date of Birth:	______________________
SSN:	______________________	SSN:	______________________

Please give a close "**Estimate**" for the following categories.
Anything owned jointly please list under the *Taxpayer* column.

Total Amount of Savings/CD's:	$ /	Total Amount of Savings/CD's:	$ /
Total Amount of Stock:	$	Total Amount of Stock:	$
Total Amount of Mutual Funds:	$	Total Amount of Mutual Funds:	$
Total Amount of Current 401k's: (401k refers to any employer sponsored plan)	$	Total Amount of Current 401k's: (401k refers to any employer sponsored plan)	$
Total Amount of Former 401k's:	$	Total Amount of Former 401k's:	$
Total Amount of IRA's including ROTH's:	$	Total Amount of IRA's including ROTH's:	$
Total Amount of Life Insurance:	$	Total Amount of Life Insurance:	$
Total Annuities or Investments :	$	Total Annuities or Investments:	$

Do You Have:		Do You Have:	
Health Insurance Coverage::	YES NO	Health Insurance Coverage:	YES NO
Long Term Care Coverage:	YES NO	Long Term Care Coverage:	YES NO
A will:	YES NO	A will:	YES NO
A Living Trust:	YES NO	A Living Trust:	YES NO
Powers of Attorney:	YES NO	Powers of Attorney:	YES NO
More Than One Savings Account:	YES NO	More Than One Savings Account:	YES NO
Are You Retired:	YES NO	Are You Retired:	YES NO
Planning to Retire in the Next Ten Years?:	YES NO	Planning to Retire in the Next Ten Years?:	YES NO