

PRATT & ASSOCIATES COMMUNICATION QUESTIONNAIRE

CLIENT

SPOUSE

FULL NAME:

EMAIL:

PRIMARY PHONE:

CAN ABOVE NUMBER RECEIVE TEXTS?

YES NO

SECONDARY PHONE:

CAN ABOVE NUMBER RECEIVE TEXTS?

YES NO

FULL NAME:

EMAIL:

PRIMARY PHONE:

CAN ABOVE NUMBER RECEIVE TEXTS?

YES NO

SECONDARY PHONE:

CAN ABOVE NUMBER RECEIVE TEXTS?

YES NO

MAILING ADDRESS

STREET: _____

CITY: _____ STATE: _____ ZIP CODE _____

DO WE HAVE PERMISSION TO SEND OFFICE UPDATES VIA EMAIL OR TEXT MESSAGE?

(EXAMPLE- SHRED DAY INFO)

YES NO

Your email address will be used for Pratt & Associates communications only and will never be sold, rented, or shared with third parties for marketing or spam.

PREFERRED METHOD OF COMMUNICATION

PHONE

EMAIL

TEXT

We would like to invite you to our new Tax Dome client portal located on our website. This easy to use tool is designed to streamline your experience with us and offer easy access to your returns.

Would you like an invitation to the Tax Dome portal emailed to you?

YES NO