

Individual Information**Date of Intake:**

Name: Victoria Torrie Buchanan
SSN: Same as Below DOB: 5-24-84
Physical Address: _____
City, State & Zip: _____
Mailing Address: _____
City, State & Zip: _____
Email: _____ Phone: _____

Spouse's information:

Name: _____
SSN: _____ DOB: _____
Email: _____ Phone: _____

Provide Copy of following documents:

- Driver's License (Owner & spouse if applicable)
- SSN (Owner & spouse if applicable)
- Signature for digital signing
- Last 2 years of Federal Tax return
- Contractor's License (If applicable) Nursery license

Entity Information

Legal Name: Dirt Road Dahlias
DBA: _____
Physical Address: 1663 Road 21 NE
City, State & Zip: Soap Lake WA 98823
Mailing Address: _____
City, State & Zip: _____
Primary Business Activity/Type: _____

NEW CLIENT INTAKE FORM

Business Entity:

Date Opened Business: 2025

Date Incorporated: Just Sole Prop

Gross Yearly Revenue: \$4000

Number of Employees: 0

Tax Information:

- Tax ID: _____
- UBI: _____
- L&I ID: _____
- ESD #: _____
- Letter ID: _____

1. How did you hear about us? _____

2. What services are you interested in?

- Business Tax Return (Corporate/Partnership/Non-Profit) ✓
- Financial Statements ✓
- Bookkeeping - Her
- ~~Payroll/Payroll Taxes~~
- Sales Tax
- Consulting (Strategic/Financial/HR/Operations/Marketing)
- Individual Income Tax Return

3. Do you use any form of accounting or tax software now? If so, which software? (Excel, QuickBooks, Peachtree, etc.)

Spread Sheet

Banking Information

Bank Name: US Bank

Username: _____

Password: _____

Routing number: 124302150

Account number: 153150768072

She took class on her Business

Take Fee from
Bank

Accounting Software system login:

Username: _____

Password: _____

Saw Account:

Username: _____

Password: _____

EFTPS:

Username: _____

Password: _____

NOTES:

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are approximately 20 lines visible. The paper has a slight shadow on the right side, suggesting it's resting on a surface.

WA USA **WASHINGTON** DRIVER LICENSE
FEDERAL LIMITS APPLY

20 R100322980757

4d LIC# WDL3R42CD93B 9 CLASS DONOR

1 BUCHANAN
2 VICTORIA WHITNEY

3 DOB 05/24/1984 4a ISS 10/03/2022

8 1663 ROAD 21 NE
SOAP LAKE WA 98851-9652

15 SEX F 16 HGT 5'-03" 17 WGT 98 lb 18 EYES BRO
12 RESTRICTIONS NONE 9a END NONE 4b EXP 05/24/2030

Victoria Buchanan

5 DD WDL3R42CD93B R100322980757

REV 11/12/2019

Victoria Buchanan