

Completion of this form will provide the information to set up your client file. Once the form is finished, please load it to your SmartVault portal or if you aren't signed up for Smartvault yet, the Hightail portal.

Please contact Lori at (281) 360-2800 or [lori@globaltaxconsult.com](mailto:lori@globaltaxconsult.com), or Priscila at [priscila@globaltaxconsult.com](mailto:priscila@globaltaxconsult.com) with any further questions.

**Taxpayer Information**

Taxpayer First Name	
Taxpayer Last Name	
Taxpayer Middle Initial	
Taxpayer Social Security #	
Taxpayer Birthdate (mm/dd/yyyy)	
Taxpayer Email Address	
Taxpayer Best Contact Phone Number	
Taxpayer Current Mailing Address	
Taxpayer Currently Living Where (Country, State, City)	

**Spouse Information**

Spouse First Name	
Spouse Last Name	
Spouse Middle Initial	
Spouse Social Security #	
Spouse Birthdate (mm/dd/yyyy)	
Spouse Email Address	
Spouse Best Contact Phone Number	
Spouse Current Mailing Address	
Spouse Currently Living Where (Country, State, City)	