AD SINGLETON & CO
CPA, INC.
CERTIFIED PUBLIC ACCOUNTANT

How to Complete This Form

1 Fill Out the Form

This is a fillable PDF form. Click or tap on any field to type your information.
Use Tab to move to the next field, or click/tap directly on any field.
Check the boxes that apply to your situation by clicking or tapping on them.

2 Save the Completed Form

On a computer:
• Press Ctrl+S (Windows) or Cmd+S (Mac), or use File → Save As
On a phone or tablet:
• Tap the Share icon, then choose "Save to Files" or "Save a Copy"

3 Upload to Our Secure Portal

Visit our secure client portal to upload your completed form:

1. Go to adscpa.com/portal/ or scan the QR code →
2. Click "Upload Files" under Guest Exchange
3. Enter your name and email, then click "Select" to choose your saved PDF file
4. Click "Upload" to submit

Scan to open portal

Have Paper Documents to Include?

You can also upload photos of paper documents through the same portal:

• Use your phone to take clear photos of any paper documents
• Make sure the entire document is visible and text is readable
• Upload photos directly from your phone using the QR code above
• Accepted formats: PDF, JPG, PNG, HEIC

AD SINGLETON & CO
CPA, INC.
CERTIFIED PUBLIC ACCOUNTANT

Client Application

Pre-Qualification Form

1 Contact Information

Full Name

Email Address

Phone Number

City, State

Preferred Contact Method

- [ ] Email
- [ ] Phone

2 Services You're Interested In

TAX PREPARATION

- [ ] Individual/Family Returns
- [ ] Business Returns
- [ ] Estate or Trust Returns

ADVISORY SERVICES

- [ ] Tax Planning & Advisory
- [ ] IRS / State Tax Resolution

ONGOING SERVICES

- [ ] Bookkeeping & Financial Statements
- [ ] Payroll Services

SPECIALIZED SERVICES

- [ ] Elder Tax & Trust Support
- [ ] Other:

Client Type

- [ ] Individual or Family
- [ ] Business (LLC, S-Corp, etc.)
- [ ] Trust or Estate
- [ ] Non-Profit Organization
- [ ] Other:

Brief description of your situation or what you need help with

Client Application

3 Your Situation

Which of the following apply? (Check all that apply)

- ☐ Self-employed or freelance income
- ☐ Investment income (stocks, crypto)
- ☐ Multi-state tax filing
- ☐ Recent major life change
- ☐ IRS or state notice received
- ☐ Rental property income
- ☐ Retirement distributions
- ☐ Foreign income or assets
- ☐ Recently started a business
- ☐ Need to file prior-year returns

How many tax returns do you need filed annually?

- ☐ 1 (individual or single entity)
- ☐ 2 (e.g., personal + business)
- ☐ 3+ (multiple entities/returns)
- ☐ Not sure

4 What Brings You Here

What prompted you to look for a CPA now? (Check all that apply)

- ☐ Never had a CPA, ready for help
- ☐ Unhappy with current preparer
- ☐ IRS or state tax issue
- ☐ Tax deadline approaching
- ☐ Current CPA retired/unavailable
- ☐ Business is growing
- ☐ Major life change
- ☐ Planning ahead
- ☐ Other:

How did you find us?

- ☐ Referral from attorney/advisor
- ☐ Web search
- ☐ Other:
- ☐ Referral from friend/family
- ☐ Found your website/resources

What's most important to you in a CPA? (Check up to 3)

- ☐ Expertise in my situation
- ☐ Explains things in plain English
- ☐ Long-term relationship
- ☐ Clear communication
- ☐ Proactive guidance
- ☐ Value for the fee

Do you currently work with other advisors?

- ☐ Attorney
- ☐ Other CPA (different entity)
- ☐ None currently
- ☐ Financial advisor
- ☐ Bookkeeper

Timeline

- ☐ Need help immediately (within 2 weeks)
- ☐ Planning ahead (no deadline)
- ☐ Tax deadline approaching (1-2 months)
- ☐ Evaluating for next year

Anything else you'd like us to know?

5 Acknowledgment

Please read and confirm:

- ☐ I understand this is a pre-qualification form.
- ☐ I have not included SSN or bank account numbers.

Submit Your Application

Upload completed form via our secure client portal: **adscpa.com/portal/**

Signature

Date