Client Intake Questionnaire
Taxable Interest & Dividend Income

A. Interest (Bring all of your 1099-INTs and 1099-OIDs with you)

Payer	Amount

Are any of the interest items shown above for the redemption of Series EE or Series I U.S. Savings Bonds issued after 1989, AND did you pay qualified **educational expenses** with the proceeds? Yes No

Are any of the interest items shown above **nominee** interest that you received for someone else? Yes No

B. Dividends (Bring all of your 1099-DIVs with you)

Payer	Amount