

Client Master Data Sheet –Natural Persons

Personal Information

| | |
|---------------------------|--|
| Last Name | |
| First Name | |
| Street | |
| Number | |
| Postal Code | |
| City | |
| Religion | |
| Date of Birth | |
| Place of Birth | |
| Nationality | |
| Tax Identification Number | |
| Private Phone | |
| Mobile Phone | |
| E-Mail | |

Spouse

| | |
|---------------------------|--|
| Last Name | |
| First Name | |
| Date of Birth | |
| Place of Birth | |
| Nationality | |
| Tax Identification Number | |
| Married Since | |
| Religion | |

Children

| | |
|--------------------------------------|--|
| Last Name | |
| First Name | |
| Date of Birth | |
| Steuerliche Identifikationsnummer | |
| Relationship to Child | |

| | |
|---------------------------|--|
| Last Name | |
| First Name | |
| Date of Birth | |
| Tax Identification Number | |
| Relationship to Child | |

Bank Details

| | |
|------|--|
| IBAN | |
| BIC | |

Tax Information

| | |
|--|--|
| Tax Number | |
| Responsible Tax Office | |
| Types of Taxes (Income Tax, VAT, Wage Tax) | |
| Previous Tax Advisor | |
| Tax Consulting Contract, Notice Period | |

To Be Completed by the Tax Advisor

| | |
|---------------------|--|
| Tax Return From | |
| Appointment | |
| Datev Meine Steuern | |
| Case Worker | |