CORIENT

Please complete and email to taxrequests@corient.com.

NEW TAX CLIENT FEE REQUEST LIST:

Corient Office:

Advisor:

Taxpayer Name:

Taxpayer Email:

(if applicable) Spouse Name:

Spouse Email:

PLEASE SELECT THE TYPE OF FEE QUOTE NEEDED:

Tax Compliance

Technical Research or Planning

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Information Needed for Tax Compliance Quote:

[1] Please provide the Client's most recently filed Tax Return(s).

They can be e-mailed directly to Tax Requests - taxrequests@corient.com along with this checklist.

[2] What tax year are services being requested for?

[3] When do you need the initial proposal back?

[4] What is the Client's current AUM? If a Prospect, what is their potential AUM?

[5] Has the Client changed residency or generated new income (i.e. working in a new State, new State-sourced K-1 income, etc.) in a different State, potentially requiring new/additional State tax filings?

☐ Yes ☐ No

If yes, please provide brief description:

[6] Has the Client acquired any significant, new investments or disposed of any assets (i.e. real estate, businesses, private investments generating K-1s, etc.)?

☐ Yes ☐ No

If yes, please provide brief description:

[7] What was the total fee charged for the Client's most recently filed Tax Return(s)?

[8] What is the Client's current fee expectation?

[9] Has the Client's Filing Status changed since the previously filed Tax Return(s)?

☐ Yes ☐ No

Did the Client get married or divorced since the previously filed Tax Return(s)?

☐ Yes ☐ No

*If divorced, please provide the Divorce Decree/Separation Agreement along with the other requested documents."

Did the Client's Spouse pass away?

☐ Yes ☐ No

[10] What is changing with the Client's tax situation going forward?"

[11] What other needs does the Client have?

[12] Under each return type listed below, list the quantity of returns to include in tax compliance engagement:

Return Type	Quantity
1040	
1041	
990-PF	
709	
1065/1120/1120S	
Other	

[13] What level of financial planning does the Advisory team engage in?

[14] How would you like the tax team to support your planning process?

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Information Needed for Tax Technical Research or Planning Quote

Please provide a detailed description of the Client's issue and/or need below:

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