



NEW BUSINESS CLIENT INFORMATION SHEET

Business Information

Business Name: _____

Contact Person: _____

Federal Tax ID Number: _____ State ID Number (PP): _____

Business Street Address: _____

City: _____ State: _____ Zip Code: _____

Work Phone # _____ Best Contact # _____

E-Mail(s): _____

State Incorporated: _____ Date Incorporated: _____

Year End: _____

Tax Type:

C-Corp S-Corp LLC Partnership Estate Trust Non-Profit Consolidated
 Sch. C/Sole Proprietor

Will you need us to prepare payroll forms? Quarterly Year End 1099's

Will you need us to prepare Business Annual Personal Property Tax Return? List State(s): _____

Will you need our assistance with bookkeeping? Yes No

Would you like to receive our monthly newsletter? Yes No

Would you like access to our online secure portal? Yes No

How did you hear about us? _____

Please provide us copies of (if applicable):

- Articles of Incorporation or Organization
- IRS Notice for FEIN
- Trust Documents
- Bylaws
- S-Corporation Acceptance Letter

Please bring two years' prior tax returns, thank you.



Partner/Shareholder/Trustee Information

1. First Name: _____ M.I. ____ Last Name _____

Title: _____ Percentage of Company Owned: ____%

Social Security Number _____

Daytime Phone #: _____ Cell Phone # _____

E-Mail: _____

Street Address: _____

City: _____ State ____ Zip Code: _____

2. First Name: _____ M.I. ____ Last Name _____

Title: _____ Percentage of Company Owned: ____%

Social Security Number _____

Daytime Phone #: _____ Cell Phone # _____

E-Mail: _____

Street Address: _____

City: _____ State ____ Zip Code: _____ *If need more space,
please list on separate sheet of paper.*

OFFICE USE ONLY

Responsible Partner: _____ Responsible Accountant: _____

If applicable:

Bookkeeper: _____ Payroll Processing: _____

Fees discussed and agreed upon are as follows:

Services to be provided by firm:

Client Number: _____

Client information entered into systems and client number assigned: _____

Secure Portal Setup (if applicable): _____

Two Years of Tax Returns Received: _____ Company Documents saved to File: _____