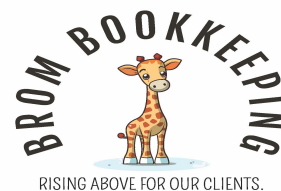


# New Client Worksheet



Business Name:	
Owner Name(s):	
Products/Services:	
EIN and State ID numbers:	
Address:	
Phone:	
Website:	
Main Contact:	
Main Contact Email:	
Type of Entity for Tax Purposes	<input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> S-Corporation <input type="checkbox"/> C-Corporation <input type="checkbox"/> Other: _____
State registered/ incorporated	
Other states with presence	
Accounting software used	
Other software the business relies on?	
Payment gateways used	<input type="checkbox"/> PayPal <input type="checkbox"/> Amazon <input type="checkbox"/> Stripe <input type="checkbox"/> Square <input type="checkbox"/> Other: _____
Banks used and number of accounts (include credit cards)	
Does the company have employees? How many? Which payroll service?	