

Crystal Thompson, CPA

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New Client – Business

Business Name: _____ EIN # : _____
Entity Type S-Corp C-Corp Partnership Sole Proprietor Non-Profit
Address: _____
Phone: _____
Email: _____
Contact Person: _____
NM CRS # _____

Shareholders/ Partner Information

| Name | Social | Address | Ownership % |
|-------|--------|---------|-------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Current Bookkeeping System

Quickbooks Desktop Sage Other _____
 Quickbooks Online Excel None
 Paper

Do you have past years unfiled returns or specific issues you need dealt with such as amended returns, audit, divorce, mortgage applications, new or changing business types ?

Click or tap here to enter notes for preparer.

Office personnel only
Projects to setup

Quote

What services are you looking for?

Individual Income Tax

- Current tax year
- Prior years Tax Year(s) Needed

Business Income Tax

- Partnership
- S-Corp
- C-Corp
- Sole Proprietor
- Non-Profit

Accounting Services

- Bookkeeping
- Gross Receipts Tax
 - Frequency Filing frequency
- Payroll Preparation
 - Frequency Payroll frequency
- Payroll Tax Filings
- Financial Statement Compilation

Other Services

- Financial Audit
- S-Election
- Accounting System Setup
- County Assessor Property Tax Reports
- IRS / State Tax notices

SUMMARY OF NECESSARY BUSINESS DOCUMENTS

- Balance Sheet or Trial Balance showing Beginning & Ending Year Balances
- Profit and Loss Statement covering entire year.
- QuickBooks Accountant copy or Backup if applicable
- All Bank Statements for Year End
- All Credit Card Statements for Year End
- Loan (including Auto, SBA & PPP) Statements or forgiveness as of Year End
- Gross Receipts Tax filings for all 12 months
- Payroll Reports
 - 941, SUTA, WC for all 4 quarters
 - W-2s & 1099 & 940 for the year
- List of any assets purchased during the year with date, description & price.
- Prior Year Tax Return including Depreciation Schedules