

Business Client Intake Form

Type of Business: Sole Proprietor LLC Partnership Corporation: S / C Independent Contractor 990

Business/Company Name: _____ Tax ID# _____
Business Location/Address: _____
Taxpayer/Business Rep Name: _____ Position: _____
Phone: _____ Email: _____

Type of Business Activity/Products provided: _____

Description of your business: _____

Business Start Date: _____ Incorporation Date: _____ Number of Owners/Shareholders: _____

Hours and Days of Operation: _____

Information about your processes and procedures:

1. Do you have a business license or professional license? Yes No
1a. If No, Are you required to have any professional license? Yes No
2. Do you have any client sign in log or procedures? Yes No
3. Do you have an appointment log? Yes No 3a. If No, How do you track your jobs? _____
4. What type of advertising do you do to get customers? _____

Information about your Income Tracking Methods:

5. What methods do you accept for payment? Cash Checks Credit Cards Other _____
6. How often do you get paid? Daily/Per Job Weekly Bi-Weekly Monthly : _____
7. Do you have a separate business account? Yes No
8. What records do you have to support your income you received? _____
9. How do you keep track of your income/sales? Written Receipt Cash Register Receipts
 Computer Generated Invoice Journal Entry Other: _____ You don't track it

Information about your Expense Tracking Methods:

10. Do you have a website? Yes No If so, list it here: _____
11. Do you advertise/market your services? Yes No If so, how: _____
12. Do you have any employees? Yes No If so, how many? ___ did you provide a w-2? ___
13. Do you have any contract labor? Yes No If so, did you provide a 1099? _____
14. Where do you provide your services/product? Customers' Homes Your Personal Residence
 Business Location Other Location: _____
15. How did you keep track of your travel expenses? Mileage Log Calendar Electronic Device
 Journal Other: _____ You don't keep track
16. Did you pay for business expenses such as supplies, license, equipment etc.? Yes No
17. How did you keep track of business expenses? _____
18. Can you provide the receipts, invoices, bank statements, logbooks, and any other documents to prove and substantiate your income, expenses, and existence of your business? Yes No
19. Who does your bookkeeping? _____

I certify under penalty of perjury that the information on this form is true and correct to the best of my knowledge; and I can provide proof of my business existence, income, expenses, and all the information.

Taxpayer Signature: _____ **Position:** _____ **Date:** _____