

NEW CLIENT INFORMATION  
BUSINESS CLIENT

DATE: \_\_\_\_\_

COMPANY NAME: \_\_\_\_\_

COMPANY CONTACT: \_\_\_\_\_

EMAIL: \_\_\_\_\_ PHONE NUMBER: \_\_\_\_\_

FAX NUMBER: \_\_\_\_\_ NUMBER OF EMPLOYEES: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

LAST YEAR TAXES WERE FILED: \_\_\_\_\_ ENTITY TYPE: \_\_\_\_\_ YEAR END: \_\_\_\_\_

CASH OR ACCRUAL BASIS: \_\_\_\_\_

In a few sentences, please describe what type of product(s)/service(s) your business offers?

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How did you hear about us? \_\_\_\_\_

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What services are you interested in? \_\_\_\_\_

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