



**NEW CLIENT INFORMATION SHEET FOR BUSINESS**

Current Date: \_\_\_\_\_

**General Business Information**

Business Name \_\_\_\_\_

DBA Name, if applicable \_\_\_\_\_

Entity Type \_\_\_\_\_ EIN: \_\_\_\_\_

Street Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Business Phone \_\_\_\_\_ Fax: \_\_\_\_\_

Company Website \_\_\_\_\_

Company Email \_\_\_\_\_

Fiscal Year End \_\_\_\_\_

States Doing Business In \_\_\_\_\_

**Pertinent Business Information**

Officer/Owner name \_\_\_\_\_

Primary Contact \_\_\_\_\_ SSN: \_\_\_\_\_

Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

Email: \_\_\_\_\_

Officer/Owner name \_\_\_\_\_ SSN: \_\_\_\_\_

Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

Email: \_\_\_\_\_

Controller Name \_\_\_\_\_ SSN: \_\_\_\_\_

Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

Email: \_\_\_\_\_

Pension Information \_\_\_\_\_

**Pertinent Business Information (continued)**

Health Insurance Information \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**PPP**

Did you apply for the PPP loan?      YES      NO

Did you qualify for the PPP loan?      YES      NO

Have you applied for the forgiveness application associated with the PPP loan?      YES      NO

**Services Desired**

- |   |   |                                     |                                    |
|---|---|-------------------------------------|------------------------------------|
| <input type="checkbox"/> Tax Individual | <input type="checkbox"/> Tax Business       | <input type="checkbox"/> Sales Tax: | <input type="checkbox"/> Quarterly |
| <input type="checkbox"/> Bookkeeping    | <input type="checkbox"/> Payroll Processing |                                     | <input type="checkbox"/> Monthly   |
| <input type="checkbox"/> F/S Review     | <input type="checkbox"/> Cash Flow Planning |                                     | <input type="checkbox"/> Yearly    |

How did you hear of our service? \_\_\_\_\_

**New Business Client Check List**

- 2 years of most recently filed tax returns
- Articles of organization or incorporation
- Operating agreement or bylaws
- Employee handbook, if any
- Sub-S approval, if applicable
- W-9s for company contractors, if any
- Independent contractor agreements, if any
- Accounting software file

**I agree that there is a fee to prepare this tax return and even if I do not file, payment is due for services rendered.**

\_\_\_\_\_  
Business Client Signature

\_\_\_\_\_  
Date