



WINTERS & ASSOCIATES

YOUR HOMETOWN TAX & ACCOUNTING TEAM

New Business Client Onboarding Form

Client Information

First Name _____

Last Name _____

Phone _____

Email _____

Preferred Method of Contact _____

Date _____

Number of Businesses _____

Address _____

Check all accounting services you are interested in

Bookkeeping

Individual Income Tax Filing

Consulting

Payroll Processing

Corporate Income Tax Filing

Business Evaluation

Sales Tax Filing

Corporation Formation

Other: _____

Business Information

Business Name _____

Business Address _____

Date company was created _____

Industry _____

Entity Type:

C-Corp (1120)


S-Corp (1120S)


Nonprofit (990N)


Single Member LLC (1040)

Multi Member LLC (1065)

Partnership/LLP (1065)

 (320) 352-3058

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