



DROP OFF DATE: _____

Office use only

BUSINESS INTAKE FORM

BUSINESS NAME _____

DBA _____

ENTITY TYPE _____

EIN _____ CA ENTITY # _____

DATE BUSINESS BEGAN _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

PHONE # _____ EMAIL _____

WEBSITE _____

OWNER/MANAGER _____ TITLE _____ PHONE # _____

OWNER/MANAGER _____ TITLE _____ PHONE # _____

OWNER/MANAGER _____ TITLE _____ PHONE # _____

BOOKKEEPING STYLE (QUICKBOOKS, EXCEL, ETC.): _____

DOES YOUR BUSINESS HAVE PAYROLL? _____ IF SO: WHO PREPARES? _____

HOW MANY EMPLOYEES _____ DOES YOUR BUSINESS HAVE A RETIREMENT PLAN? _____

LAST YEAR TAXES WERE FILED? _____ YEAR ENDING DATE _____

(PLEASE ATTACH COPY)

☐

Would you like to receive your returns electronically?

☐

Would you like to sign your returns electronically?

Referred by: _____

NEW BUSINESS STARTUP FEE

I understand that there is a **one-time \$75.00 New Business Start-Up Fee**. This fee is **separate from all other service fees**, and I will receive a separate **QuickBooks invoice** for payment.

Client Initials: _____ Date: _____