

New Client/Business Profile

Company profile	Profile information	Additional details/notes
Company name (DBA):		
Legal name (if different from above):		
Industry:		
Primary contact name:		
Primary phone number:		
Primary mobile number:		
Primary email:		
Company website:		
Address: Street, City		
Address: State, Zip		
Tax entity/Tax form:		
FEIN/SSN:		
Accounting year end:		
Year(s) in business:		
Current overall accounting solution:		
Accounting team members:		
Annual gross revenue:		
Number of employees: (if applicable)		
Affiliated companies: (if applicable)		
<i>Any other additional notes or advisories</i>		



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