

RBS Powerhouse Client Intake Form - Business

Business Information:

- Business Name: _____
- Business Address: _____
- City, State, ZIP: _____
- Business Phone: (____) - _____
- Business Email: _____
- Business EIN: _____
- Type of Business Entity (LLC, Corporation, Sole Proprietor, etc.): _____
- Date Business Established: //_____

Financial & Tax Information:

- Do you currently have a bookkeeper? (Yes/No) _____
- Do you need payroll services? (Yes/No) _____
- Do you need assistance with employment taxes? (Yes/No) _____
- Do you owe any IRS debt? (Yes/No) _____
- Do you require franchise tax services? (Yes/No) _____
- Business Annual Revenue: \$_____
- Business Expenses (Annual Estimate): \$_____

Additional Notes or Special Requests:

By signing below, I confirm that the information provided is accurate to the best of my knowledge.

Client Signature: _____

Date: //_____