

Please print **clearly**

Company information

Registered Bus. Name \_\_\_\_\_

Trade Name \_\_\_\_\_

Employer Identification Number (EIN) \_\_\_\_\_

Type of organization:  Corporation  Partnership  LLC

Tax form filed:  1120  1120-S  1065  990  990-EZ

I don't know

This is the first tax return for my business

Did your company invest in cryptocurrency? Y / N

Current Address (PO Box not accepted)

\_\_\_\_\_  
\_\_\_\_\_

Primary phone number \_\_\_\_\_

2ndary phone number \_\_\_\_\_

Email \_\_\_\_\_

Owners

First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_

Last Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Social Security number \_\_\_\_\_ Title \_\_\_\_\_

First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_

Last Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Social Security number \_\_\_\_\_ Title \_\_\_\_\_

First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_

Last Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Social Security number \_\_\_\_\_ Title \_\_\_\_\_

Do you have any unfiled returns or past-due tax obligations? Y / N

How will you pay for our services?

- Electronic invoice (pay online by check or credit card)
- Mail a check
- Credit/Debit card over the phone

Note: in accordance with our profession's standards returns will not be filed until fees for tax preparation services are paid

How else can we assist you?

- Tax planning
- Employee benefits and retirement plans
- Payroll
- Bookkeeping/Accounting services
- Business Financing
- Other