

**Welcome to**  
**Vincent Bookkeeping**  
(Business Customer Information Sheet)



**Please complete this form as it will become part of your customer record.**

**How did you first find out about us?** (Please circle your choice.)

Yellow Pages \_\_\_\_\_ Seminar \_\_\_\_\_

Craigslist – Google – Yahoo – YellowPages.com – Intuit ProAdvisor.com – Elance.com - SJ Business Journal - Chamber

Drive By/Signage – Referral \_\_\_\_\_ Other: \_\_\_\_\_

**How is your Business listed?**

Sole Proprietor – Partnership, - LP, LLP, - C Corporation, - S Corporation, Sub Corporation, - LLC?

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**Business Information:** (Please provide the address where you want all correspondence mailed.)

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

Point of Contact \_\_\_\_\_

Mailing Address \_\_\_\_\_ EDD Acct # \_\_\_\_\_

City, St, Zip \_\_\_\_\_ Tax ID \_\_\_\_\_

Phone / Ext \_\_\_\_\_ Alt. Phone \_\_\_\_\_

Email Address: \_\_\_\_\_ Fax \_\_\_\_\_

Date Business was opened: \_\_\_\_\_ Owners DOB: \_\_\_\_\_ Owners SS # \_\_\_\_\_

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**Alternate/Emergency Contact Information:** (Attorney/Power of Attorney, CPA or Family Member)

Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

City, St, Zip \_\_\_\_\_

Phone / Ext \_\_\_\_\_ Alt. Phone \_\_\_\_\_

Email Address: \_\_\_\_\_ Fax \_\_\_\_\_

\_\_\_\_ I decline to provide complete alternate or emergency contact information. Initials: \_\_\_\_\_

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**Company Registered Agent/Representative/Employee:** (For Corporations and LLC's only)

Name \_\_\_\_\_ Lic. No. \_\_\_\_\_

Phone / Ext \_\_\_\_\_ Alt. Phone \_\_\_\_\_

Email Address: \_\_\_\_\_ Fax \_\_\_\_\_

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**Previous Bookkeepers Contact information**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone / Ext \_\_\_\_\_ Alt. Phone \_\_\_\_\_

Email Address: \_\_\_\_\_ Fax \_\_\_\_\_

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**Agent / Owner / President/ CFO/ Employee Signature**

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**Date**