



## New Client Information Sheet - Business

Business Name \_\_\_\_\_

DBA \_\_\_\_\_

FEIN # \_\_\_\_\_ Current Tax Classification \_\_\_\_\_

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

Address – Legal (if different than mailing address) \_\_\_\_\_

Phone # \_\_\_\_\_ Email \_\_\_\_\_

**Do you have the following? If yes, please provide the documents.**

Articles of Incorporation Yes \_\_\_\_\_ No \_\_\_\_\_

IRS FEIN letter Yes \_\_\_\_\_ No \_\_\_\_\_

Operating/Shareholders Agreement Yes \_\_\_\_\_ No \_\_\_\_\_

Prior Annual Report Yes \_\_\_\_\_ No \_\_\_\_\_

Do you want us to be your registered agent? Yes \_\_\_\_\_ No \_\_\_\_\_

Do you want us to file your annual report? Yes \_\_\_\_\_ No \_\_\_\_\_

Do you want us to file your sales tax return? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, are they monthly, quarterly or annually? \_\_\_\_\_

How is accounting work done for your business (*QB desktop, QBO, Other Software, Excel spreadsheet, or manual paperwork*)? \_\_\_\_\_

Do you want us to do your bookkeeping? Yes \_\_\_\_\_ No \_\_\_\_\_

Do you have payroll? Yes \_\_\_\_\_ No \_\_\_\_\_ Would you like PK Tax to be your payroll processor? Yes \_\_\_\_\_ No \_\_\_\_\_

Who is your payroll processor? \_\_\_\_\_

How did you hear of us? \_\_\_\_\_