



New Client Information Sheet – Business

Business Name _____

Primary Contact Name & Title _____

Phone # _____ Email _____

DBA _____

FEIN # _____ Current Tax Classification _____

Address -Mailing _____

Address – Legal (if different than mailing address) _____

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 _____ If you have a Bookkeeper and you would like for us to work with them, please provide their company name, contact name, email and phone number.

Do you have payroll? Yes _____ No _____

Who is your payroll processor? _____

How did you hear of us? _____