



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? If yes, please provide.

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 have payroll? Yes No

Who is your payroll processor? _____

Would you like PK Tax to be your payroll processor? Yes No

How did you hear of us? _____