

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 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 _____

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? _____

