

## 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? \_\_\_\_\_

