



## New Client Information Form - Business

Name of Business: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Business Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Email: \_\_\_\_\_ Fax: \_\_\_\_\_

Date Entity Formed: \_\_\_\_\_ Federal Tax ID#: \_\_\_\_\_

Type of Entity: Sole Prop \_\_\_\_\_ LLC \_\_\_\_\_ S Corp \_\_\_\_\_ C Corp \_\_\_\_\_ LLLP \_\_\_\_\_ Trust \_\_\_\_\_ Other \_\_\_\_\_

Return Type to File: Sch C \_\_\_\_\_ Sch E \_\_\_\_\_ Sch F \_\_\_\_\_ 1120 \_\_\_\_\_ 1120S \_\_\_\_\_ 1065 \_\_\_\_\_ 1041 \_\_\_\_\_

Date of S-Corp acceptance (if applicable): \_\_\_\_\_ Entity Year End: \_\_\_\_\_

States you need a tax return filed in: \_\_\_\_\_

What your business does: \_\_\_\_\_

Method of accounting: Cash \_\_\_\_\_ Accrual \_\_\_\_\_ Other \_\_\_\_\_

Name of each owner/shareholder, social security number or federal employer identification, number of shares/units and date issued:

<u>Name</u>	<u>Identification #</u>	<u># of Shares</u>	<u>Date Issued</u>	<u>Foreign (Y)</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Are there any foreign owners/shareholders? Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, please identify above.

How were you referred to us? \_\_\_\_\_

**INTERNAL USE ONLY:** PROJECTS NEEDED IN OTW \_\_\_\_\_

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