kfreeman, CPA PLLC
Financial Services for Your Business and Family

Date: ______________

Team Member (Fed Tax/Fran./Qbooks): _________________ Other Team Member (Pay/1099/Sales): _________________

New Client Information – For Preparing Business Tax Returns

Company Name: ___________________________ Name of Owner: _______________________
Referred By: _____________________________ TIN/EIN/FED: _________________________

Owner/Client Date of Birth: ________________________ SSN: _____________________________
Business Mailing Address: ____
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Business Phone: ___________________ Fax: _________________ Email: ____________________________

Other Business Owners: ______________________ ______________________ _____________________

Names & Contact Info of Company Personnel We Will Regularly Communicate With:
Name: _______________________ Phone: ___________________ Email: _________________________
Name: _______________________ Phone: ___________________ Email: _________________________

Type of Return: ☐ 1120S ☐ 1120C ☐ 1065 ☐ 1041 ☐ Sch. C ☐ Other (Leave Note)

Profile Questions: (Circle Yes / No)

- What is the nature of your business (services / goods provided)? ____
- Do you have people that require you to issue 1099's (Anyone paid over $600 for services)? Yes / No NO
- Do you need us to prepare your 1099's each year? Yes / No
- Do you have W-2 Employees (or yourself)? Yes / No Do you need us to prepare your payroll taxes? Yes / No
- Are you going to prepare your QuickBooks or do you need us to prepare your QuickBooks throughout the year? Yes / No
- Type of QuickBooks? _________________ How are we Accessing It (Circle): Acct. Copy LogMeIn QBooks Online
- Do you have a store front / separate building or location? Yes / No Do you need us to prepare your BPP Taxes? Yes / No
- Do you collect sales tax for goods or services? Yes / No Do you need us to prepare Sales Tax Returns? Yes / No
- Do you have, or are you interested in, a Company Retirement Plan? Yes / No Circle: SEP SIMPLE SH401K 401K PSP

Scheduled QuickBooks Intro Training / Walk Through Date: __________________________

Services to provide:

☐ Federal Tax Return Preparation	☐ Form 1099 Preparation	☐ Life Insurance / Long Term Care
☐ Franchise Tax Preparation	☐ Business Personal Property Tax	☐ College Education Planning
☐ QuickBooks / Financials	☐ Sales Tax Preparation	☐ Cash Flow & Debt Management
☐ Payroll Tax Prep. (941, 940, TWC, W-2's)	☐ Retirement/Invest. Management	☐ Trust & Estate Planning

Additional Notes:

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For Office Use Only:

☐ ProSeries ☐ BQE ☐ E-File Cabinet ☐ Const. Cont. ☐ Blue File ☐ Red File (Sch. C) ☐ Orange File (BPP)