

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: _____

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
- 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:

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

Additional Notes:

For Office Use Only:

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