



Annual Business Client Update Questionnaire

In the last year, have any of the following occurred:

- Business name changes _____
- Business address change _____
- Business contact information
 - Phone number _____
 - Email _____
- Change in ownership- (added new partners, got rid of partners, % change)
 - Owner Name _____
 - % change _____
 - Address Change _____
 - Owner Name _____
 - % change _____
 - Address Change _____
 - New Owner _____
 - Ownership % _____
 - Home Address _____
 - SSN _____
 - Contact Number _____
- Large new business assets _____
- Acquisition or Disposition of business property _____

QuickBooks Version: _____

Password: _____

Note: This form is designed to provide an annual update to key client related information