



New Business Tax Client Information Sheet

Date _____
 Business Legal Name _____
 Work Phone _____
 Work Cell _____
 Address _____
 City/State/Zip _____
 EIN Number _____
 Entity (S,LLC) and Date _____
 Numbers of Owners _____
 Type of Business _____

Did you provide a QB file?

What version of QB did you provide? _____
 Is the QB file password protected? _____

Owner #1
 SS# _____
 Date of Birth _____
 Percentage Owner _____
 Home Address _____
 Cell Phone _____
 Email Address _____

Owner #2
 SS# _____
 Date of Birth _____
 Percentage Owner _____
 Home Address _____
 Cell Phone _____
 Email Address _____

Owner #3
 SS# _____
 Date of Birth _____
 Percentage Owner _____
 Home Address _____
 Cell Phone _____
 Email Address _____

Owner #4
 SS# _____
 Date of Birth _____
 Percentage Owner _____
 Home Address _____
 Cell Phone _____
 Email Address _____

Note: All tax returns will be electronically filed
Note: Completed client copy will be sent via secure email
Note: Distribution of K-1's are the responsibility of the majority owner