



New Business Tax Client Information Sheet

Date _____
 Business Legal Name _____
 DBA _____
 Work Phone _____
 Business Address _____
 City/State/Zip _____
 EIN Number _____
 Date Established _____
 Entity Type _____
 Number of Owners _____
 Type of Business _____
 State(s) of Source of Income _____

Did you provide a QB file? _____ If YES; what version of QB? _____
 Password? _____
 ** If you have QuickBooks Online, access should be granted to Jhaugen@cfocolorado.biz

Did you run payroll for yourself or employees? _____
 Who is your payroll service provider? _____

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 _____

Are You Using Mileage Log For All Business Vehicles? _____ *if YES, please provide

Note: All tax returns will be electronically filed UNLESS manual filing is requested
Note: Completed client copy will be sent via secure email
Note: Completed K-1s will be sent via secure email; distribution of K-1s is the responsibility of the majority owner