ASSOCIATES IN ACCOUNTING CPA
FIELDS | U'SELLIS

New Client Sheet - Business
Let's talk about you!

Date ______________________________

Business Name ______________________________

Type of Business ______________________________

Owner ______________________________

Address ______________________________

City ______________________ State __________ Zip __________

Please circle the primary way you would like us to communicate with you.

Work Phone ____________________ Home Phone ____________________

Fax Number ____________________ Cell Phone ____________________

Website ____________________ Email ____________________

Entity Type ____________________ Software Used ___QuickBooks, Version __________

Date of Incorporation ____________________ ___Peachtree

State of Incorporation ____________________ ___Other __________

Fiscal Year End ____________________ Software Password __________

Federal ID Number ____________________ Retirement Plan___Simple IRA

State ID Number ____________________ ___401K

OL-3 Account Number ____________________ ___Other __________

Other Local ____________________ Do you use EFTPS to pay federal payroll taxes? Y N

Shareholder Information *(If you need more room, please write this information on a separate sheet.)*

Legal Name	Address	Social Security Number

How did you hear about our firm?

- _____ Referred by ______________________
- _____ AT&T Real Yellow Pages
- _____ Facebook
- _____ Internet
- _____ Twitter
- _____ Yellow pages.com/White pages.com
- _____ Other ______________

Would you like to hear more about our online portal?

- _____ Yes, please
- _____ No, thank you

Does your business have a Facebook page?
____ Yes _____ No

Does your business have a Twitter account?
____ Yes____ No

Do you have a Smart Phone?

- _____ Yes, I'm an Android user
- _____ Yes, I'm an iPhone user
- _____ No

Business Client Services/Fees
To Be Filled in by Accountant

Engagement / Fee Estimates			
Engagement/Project	**Fee**	**Engagement/Project**	**Fee**
TAX SERVICES		**FINANCIAL STATEMENTS**	
740 (KY Non-Profit)		Prepared Annual	
990 (Exempt)		Prepared Quarterly	
1065 (Partnership)		Prepared Monthly	
1065 – Amend		Prepared Other	
1065 - Past		Review Annual	
1065 – Re-Do			
1120 (Corporation)		**PAYROLL TAX**	
1120 – Amend		Payroll Tax Annual	
1120 – Past		Payroll Tax Quarterly - Active	
1120 – Re-Do		Payroll Tax Quarterly - Zero	
1120S (S-Corporation)		Payroll Tax Quarterly – 3Z4A	
1120S – Amend		1099/1096	
1120S – Past		W-2	
1120S - Re-Do		Payroll Tax Monthly – Kentucky (K-1)	
5500 (Employee Benefit)		Payroll Tax Monthly – Indiana (WH-1)	
KY 62A500 (Property Tax)		Payroll Tax Monthly - Local	
Louisville OL-3		Payroll Tax Monthly - 941	
State Return			
		SALES TAX	
ACCOUNTING SERVICES		Sales Tax Annual	
Bookkeeping Annual		Sales Tax Quarterly	
Bookkeeping Quarterly		Sales Tax Monthly	
Bookkeeping Monthly			
		TAX PLANNING	
CONSULT		Tax Estimate	
Articles of Incorporation			
Audit (Gov't)			
Audit (Workers' Comp)			
Consulting - Other			
Correspondence			
Governmental ID Number Applications			
Offer in Compromise			
Research			

Originator ___________________ Partner ____________________

Client ID ___________________ Manager ____________________

Accountant who met with client ___________________________________

Set up in Practice ______________ Thank you Note ____________________

Set up Projects ______________ Services Agreement Package ____________________

Set up in Drake ______________ Set up Project Envelope ____________________

Set up in Doc Mgr ______________ Set up in Constant Contact ____________________

Interaction Sheet in Doc Mgr___________ Scan new client sheet into Doc Mgr ____________________