

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



**ASSOCIATES**  
 IN ACCOUNTING CPA

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 \_\_\_\_\_

Does your business have a Facebook page?  
 \_\_\_ Yes \_\_\_ No

Does your business have a Twitter account?  
 \_\_\_ Yes \_\_\_ No

Would you like to hear more about our online portal?  
 \_\_\_ Yes, please  
 \_\_\_ No, thank you

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
<b>TAX SERVICES</b>		<b>FINANCIAL STATEMENTS</b>	
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)		<b>PAYROLL TAX</b>	
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			
		<b>SALES TAX</b>	
<b>ACCOUNTING SERVICES</b>		Sales Tax Annual	
Bookkeeping Annual		Sales Tax Quarterly	
Bookkeeping Quarterly		Sales Tax Monthly	
Bookkeeping Monthly			
		<b>TAX PLANNING</b>	
<b>CONSULT</b>		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 \_\_\_\_\_