



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 _____
 _____ Facebook _____
 _____ Internet _____
 _____ Twitter _____
 _____ Other _____

We offer a free secure on-line portal to our clients. Let us know if you would like to learn more about this!