

BUSINESS INFORMATION INTAKE SHEET

Date: _____

Entity Information

Name: _____

Address: _____

Phone: _____ Email: _____

Product or Services Offered: _____

Owner(s) Information (if different)

Name: _____

Address: _____

Phone: _____ Email: _____

Name: _____

Address: _____

Phone: _____ Email: _____

Date Formed: _____ **State Formed In:** _____

Type of Entity: _____ LLC _____ Inc _____ PLLC _____ LLP _____ Ltd

Tax Classification: _____ S Corp _____ C Corp _____ Partnership _____ Disregarded Entity

How can we help you?

_____ Tax Return Preparation _____ Tax Planning (Estimated Payments) and Tax Savings Strategies

_____ Bookkeeping Services: _____ Annually _____ Quarterly _____ Monthly

_____ QuickBooks Training _____ Financial Statement Corrections _____ Business Coaching/Consultation

_____ Payroll Services: _____ Payroll Processing _____ Payroll Reporting _____ Treasury Payments

_____ IRS Representation _____ Tx Comptroller Representation

_____ Other Services: _____

For Office Use Only

Met with: _____ Task Plan: _____

Items Requested:

_____ Tax Returns (3 yrs) _____ Financial Statements _____ IRS Notices _____ Tx Comptroller Notices

_____ Bank Statements _____ Financial Login Information _____ Accounting Software Access

_____ Engagement Letters _____ Tax Packages _____ Webfile Number