



## **Business Client Intake – Information Requirements**

To ensure accurate and timely preparation of your business tax filings and compliance services (including Forms 1120, 1120-S, and 1065), we require the information listed in the accompanying document. This information is used solely for verifying your business's legal, financial, and tax reporting status and for preparing required federal and state filings on your behalf.

We follow applicable IRS data-handling, record-keeping, and confidentiality standards, along with industry best practices for safeguarding taxpayers and business information. Protecting your financial and organizational data is a top priority.

For security purposes, this document is provided for reference only to show what information will be required. Please do not submit sensitive or confidential data through this form unless you have been provided with a secure submission method.

After reviewing the requirements, you will receive instructions for securely submitting the necessary information and supporting documents. **We also schedule in-office appointments for clients who prefer to review their information and complete the intake process in person.**

Thank you for your cooperation and for supporting a compliant and secure tax-filing process.

## **Business Client Intake Form**

### **1. Business Information**

- Legal Business Name
- Trade Name / DBA
- Entity Type (check one)
  - C-Corporation (Form 1120)
  - S-Corporation (Form 1120-S)
  - Partnership (Form 1065)
  - LLC (taxed as):  C-Corp  S-Corp  Partnership
- State of Incorporation / Formation
- Date Business Started
- Federal EIN
- State Tax ID (if applicable)

### **2. Contact Information**

#### **Primary Contact**

- Name
- Title
- Email
- Phone

#### **Business Address**

- Street
- City
- State
- ZIP

#### **Mailing Address (if different)**

### **3. Ownership / Shareholders / Partners**

List all owners, shareholders, or partners:

**Name SSN / EIN Ownership % Title**

### **4. Business Activity**

- Principal Business Activity
- Products or Services Provided
- NAICS Code (if known)
- States where business operates

**5. Accounting Information**

- Fiscal Year End
- Accounting Method  Cash  Accrual
- Bookkeeping System (QuickBooks, etc.)
- Does your business maintain financial statements?  Yes  No

**6. Banking & Income**

- Business Bank Name
- Number of Business Accounts
- Does the business accept:
  - Credit Cards
  - ACH
  - Cash
  - Online Payments

**7. Payroll & Employees**

- Number of Employees
- Payroll Provider
- Were payroll tax returns filed?  Yes  No

**8. Other Tax Matters**

- Did the business issue 1099s?  Yes  No
- Does the business have sales tax obligations?  Yes  No
- Does the business have nexus in other states?  Yes  No

**9. Prior Filings**

- Were prior-year tax returns filed?  Yes  No
- Do you have prior-year financials?  Yes  No

**10. Requested Services**

- Corporate / Partnership Tax Filing
- Bookkeeping
- Payroll
- Sales Tax
- 1099 Preparation
- IRS / State Compliance
- Audit or IRS Notices
- Entity Setup or Changes

**11. Document Checklist**

- Prior year tax returns
- Financial statements (P&L, Balance Sheet)
- Bank statements
- Payroll records
- 1099 information
- Ownership documents
- IRS or State letters

**12. Authorized Representative**

I certify the information provided is accurate and complete.

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_