



## 2023 BUSINESS INFORMATION FORM

Today's date:		Tax Year(s):	
Legal Business Name:		Federal Identification Number:	If LLC how are you taxable (circle one): Sole Prop / Corp / S-Corp / Partnership
Type of Business:	Date Business Started:		
Business address:		Business Phone:	Website:
P.O. Box/Suite Number:		( )	
City:	State:	ZIP Code:	Email Address:
State(s) Where Registered:		State(s) Where Income Is Earned:	% of Income for Each State:
State Tax ID(s):		Local Tax ID (if applicable) :	
<b>SHAREHOLDER OR PARTNER(S) INFORMATION</b>			
(Please skip this section if no Shareholder or Partners)			
Name:	Social Security Number:	Address:	% of Ownership
Name:	Social Security Number:	Address:	% of Ownership
Name:	Social Security Number:	Address:	% of Ownership
Name:	Social Security Number:	Address:	% of Ownership
<b>*PLEASE PROVIDE A COPY OF PREVIOUS FILED RETURN IF NEW FST CLIENT*</b>			
The above information is true to the best of my knowledge. I understand that I am legally responsible for all information presented on this form and I understand that this information will be used to prepare the business tax return.			
Taxpayer Signature & Title:			Date

### Items Needed to Complete Return

- ☐ Copy of Previous Filed Business Tax Return
- ☐ Income Statement (Profit & Loss Statement) 01-01-23 to 12-31-23
- ☐ Balance Sheet Report as of 12/31/2023
- ☐ Asset details for purchases in 2023
- ☐ Form 1098-INT- Interest Income
- ☐ Form 1099-Misc- Additional Untaxed Income
- ☐ Form 1099-DIV- Dividend Income
- ☐ Number of 2023 W-2s (if applicable): \_\_\_\_\_
- ☐ Number of 2022 1099s (if applicable): \_\_\_\_\_
- ☐ If you are requesting an extension and anticipate having a balance due, the balance due must be paid with the extension. Your initials will serve as documentation that you have been informed of this requirement.

Business Owners Initials: \_\_\_\_\_ Date: \_\_\_\_\_

Please drop off, fax, or email the above checked items so that we may complete your return. Thank you.

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