Business Client Information Sheet

General Client Information:

Client Legal Name: ____

Client Address: ____

City, State, Zip:____

Local Phone:_________________Fax:____________E-Mail:________________

Federal ID #:_________________ Web Site:______________________________

Entity Type: __________________Year End:______________________________

Type of Business:____

Other Locations:____

Incorporation Date (Provide Copy of Approval): ___________________________

S Corporation Approval Date (Provide IRS Approval Letter):_____________________

Referral Source:________________ # of Employees:__________ Union?_________

Contact:______________________ Bookkeeper:_________________________

Attourney:_____________________ Phone: ____________Fax:________________

Bank:________________________Officer:______________Phone:_____________

Owners Names:____________________________ # of Shares:________________
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Family Relationship Descriptions:____
____

Related Parties or Businesses:____
____
____

Additional Accounting/Other Services Desired **:**

Description of Service:	*Yes*	*No*	
Enter client source documents in our software.			
Balance Bank Accounts.			
Summarize sales activity.			
Other bookkeeping services.			
Prepare adjusting entries for financial statements.			
Prepare closing entries for client.			
Prepare bonding schedules.			
Prepare monthly financials.			
Prepare Quarterly/Semi-Annual financials.			
Prepare Annual financials.			
Prepare Business tax returns.			
Prepare Owners' tax returns.			
Prepare live payroll.			
Prepare quarterly payroll returns.			
Prepare sales tax returns.			
Prepare personal property tax returns.			
Estate planning for owners.			
Business valuation for estate planning or buy/sell agreements.			
Financial planning for owners.			
Tax planning for entity.			
Tax planning for owners.			
Cash Flow Generator Program			
Pension Plan returns or Establishment			
Personal Financial statements.			
Budgets or forecasts.			
Accounting software consultation.			
Accounting software training.			
Upgrade reporting for future credit needs.			
Employee Benefit Plan Setup			
Web Site Design			
Web Site Hosting			
Networking			
Computer Consulting			
Other:			

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