



Today's Date: \_\_\_\_\_ Tax Preparer: Dawn / Michelle / Tarina Client # \_\_\_\_\_

Circle all that apply: Tax / Accounting / Business Development / Other \_\_\_\_\_

Company's Name: \_\_\_\_\_ Federal ID #: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_ UBI #: \_\_\_\_\_

Business Activity: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
(Date Incorporated) (Fiscal Year End)

Physical Address: \_\_\_\_\_  
Street City State Zip

Billing Address: \_\_\_\_\_  
(If Different than Physical Address)

**Please** Mark Preferred Contact Number:

Office #: \_\_\_\_\_ Ext.: \_\_\_\_\_ Fax: \_\_\_\_\_

Cell: \_\_\_\_\_ Who's: \_\_\_\_\_ E-mail: \_\_\_\_\_

Cell: \_\_\_\_\_ Who's: \_\_\_\_\_ E-mail: \_\_\_\_\_

Other Important Phone #'s: \_\_\_\_\_

**Current or Predecessor Accountant:**

**Bank:**

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

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

Address: \_\_\_\_\_

Contact: \_\_\_\_\_ Phone #: \_\_\_\_\_

Phone #: \_\_\_\_\_

Address: \_\_\_\_\_

**Attorney:** \_\_\_\_\_

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

**Name of Stock Holders:** \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone #: \_\_\_\_\_

\_\_\_\_\_

**Name of:** \_\_\_\_\_  
(Partners / Owners / And or Top Management of Company)

Do you have formation paperwork (Including Minutes / Bylaws / Stock Certificates / Etc.)? Yes: \_\_\_\_\_ No: \_\_\_\_\_

How did you hear of us? \_\_\_\_\_

Office use: Lacerte: \_\_\_\_\_ OT: \_\_\_\_\_