Client Information Sheet-Business

In order to keep our files current, please fill out all sections.

Today's Date: ______________________________

Corporate Name: ______________________________

DBA Name: ______________________________

Physical Address: ______________________________

Billing Address: (If different than physical address)
Attn: ______________________________

Contact Name # 1: ______________________________
Contact Phone # 1 cell: ______________________________

Contact Phone # 1 home: ______________________________
Contact Email # 1: ______________________________

Contact Name # 2: ______________________________
Contact Phone # 2 cell: ______________________________

Contact Phone # 2: ______________________________
Contact Email # 2: ______________________________

Business Activity: ______________________________
Fiscal Year End: ______________________________
Nature of Business: ______________________________
Business Phone #: ______________________________
Email: ______________________________
Software: ______________________________
Software User Name: ______________________________
Software Password: ______________________________
Tax Basis of Accounting: (Cash/Accrual/Other)____ ________
Retirement Plan (Circle One): Yes No
Payroll (Circle One): Yes No __

Product or Service: ______________________________
Entity Type: (Circle One) CCorp SCorp Ptr LLC Don't Know
Date Business Started: ______________________________
Business Fax #: ______________________________
City: ______________________________
County: ______________________________
School District: ______________________________
Number of owners/members: ______________________________
Financial Statement Basis of Accounting: ________________
Retirement Plan Type: ______________________________
Payroll Company: ______________________________

What type of help do you need (circle all that apply)? Tax / Accounting / Bookkeeping / Payroll / Other

Do you have ownership or are a beneficiary in any of the following (circle all that apply)?

Sole Proprietorship / Partnership / C Corporation / S Corporation / Trust / Other

How did you hear about The McKillip Group CPAs?______________________________

Would you like to receive our firm's newsletter of tax tips? Yes No

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Internal Use Only:
( ) Added to Drake ( ) Added to Client List ( ) Added to Constant Contact ( ) Added to QBs