

# 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 home: \_\_\_\_\_

Contact Phone # 1 cell: \_\_\_\_\_

Contact Email # 1: \_\_\_\_\_

Contact Name # 2: \_\_\_\_\_

Contact Phone # 2: \_\_\_\_\_

Contact Phone # 2 cell: \_\_\_\_\_

Contact Email # 2: \_\_\_\_\_

Business Activity: \_\_\_\_\_

Product or Service: \_\_\_\_\_

Fiscal Year End: \_\_\_\_\_

Entity Type: (Circle One) CCorp SCorp Ptr LLC Don't Know

Nature of Business: \_\_\_\_\_

Date Business Started: \_\_\_\_\_

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

Business Fax #: \_\_\_\_\_

Email: \_\_\_\_\_

City: \_\_\_\_\_

Software: \_\_\_\_\_

County: \_\_\_\_\_

Software User Name: \_\_\_\_\_

School District: \_\_\_\_\_

Software Password: \_\_\_\_\_

Number of owners/members: \_\_\_\_\_

Tax Basis of Accounting: (Cash/Accrual/Other) \_\_\_\_\_

Financial Statement Basis of Accounting: \_\_\_\_\_

Retirement Plan (Circle One): Yes No

Retirement Plan Type: \_\_\_\_\_

Payroll (Circle One): Yes No

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 Tax Software ( ) Added to Client List ( ) Added to Newsletter ( ) Added to QBs