

SIMPLE ACCOUNTING BUSINESS TAX PREPARATION INTAKE FORM

Business Name		EIN	
Address			
City	State	Zip	
Contact Person		Preferred Method of Contact	
Business Phone		Cell Phone	Email
Best Time to Reach:		# of years in business	Number of Employees
What is the nature of the business?			
Date Business Started (If started this year)			
Sole Proprietorship	<input type="checkbox"/>	Corporation	<input type="checkbox"/>
Partnership	<input type="checkbox"/>	Non Profit	<input type="checkbox"/>
		S-Corp	<input type="checkbox"/>
		LLP	<input type="checkbox"/>
		LLC	<input type="checkbox"/>
		Individual	<input type="checkbox"/>

Name(s) of Owners, partners:

Name:	Title:	%ownership?:
Address:	City	State
	Zip	
Phone:	Email:	
Name:	Title:	%ownership?:
Address:	City	State
	Zip	
Phone:	Email:	

Please provide us with an Accountant copy of your QuickBooks, or if you need us to figure your income and expenses we will need access to your bank statements preferably access to your bank account so that we can do the bookkeeping for them. If you do not have a QuickBooks use the below worksheet.