

CLIENT INFORMATION SHEET FOR BUSINESS TAX PREPARATION

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Tax Year :	Data Collection Date :	Already Filed with AGI (Tax Year) :
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FILING STATUS INFORMATION (Please check the appropriate status)

- ☐ Partnership (Form 1065)
☐ S-Corporation (Form 1120-S) Please indicate date of S-Corp Election _____
☐ C-Corporation (Form 1120)

BUSINESS INFORMATION

Name of Business		
FEIN	Date of Business Started	Business Code (NAICS)
Business Activity		
Principal Business Address		
Accounting Method	Name of Representative Partner	

PARTNERS INFORMATION

S. No	First Name	Last Name	SSN	Partner's Share (%)	Email Address	Contact No.	Address
1							
2							
3							
4							
5							

GENERAL INFORMATION / DOCUMENTS REQUIRED

- ☐ Please provide the Current year Balance Sheet
☐ Please provide the Profit & Loss statement
☐ Please provide the Certificate of Formation / Article of Formation
☐ Please provide the EIN Letter
☐ Please provide the Letter from the Comptroller's Office of Public Accounts (pertaining to Franchise Tax filing)
☐ Please provide the XT Number/Webfile Number for filing the Franchise Tax (FTR) for Texas-based entities
☐ Please provide all the tax source documents related to the business

BANK INFORMATION

Bank Name

Bank Account Number

Bank Routing Number

ASSETS INFORMATION

S. No	Assets (Equipment, Machinery, Computer/Laptop)	Purchase Date	Make & Model	Purchase Value
1				
2				
3				
4				
5				

At your request we will process the information from this sheet and other documents provided by you. If you decide not to use our services for any or all reasons, you will owe us the processing fee of \$95.00.

(PLEASE NOTE: RETURN WILL NOT BE PROCESSED AND COPY WILL NOT BE PROVIDED UNTIL THE FEE IS COLLECTED.)

By signing below, I certify that I have read the above mentioned information and that everything hereon is correct to the best of my knowledge.

Print Name

Representative Partner Signature

Date