Intake Form for Non-Profits

(New Clients)

Business Name ____

Business Address____

____

Business Phone Number ______________________________ Business Fax ________________________

EIN________________________________ State EIN _________________________________

Exemption # (example 501 (c) 3)________________________________

Date of exempt status ___________________________________

If corporation, state incorporated____

# of states you operate in ________________

Date organized/ Incorporated_____________________ Date business activity started__________________

Are you a church _____________________

Description of business activity and principal product or service____________________________________

____

Name, social security number, address, phone number, and title for each officer, director, or board member:

1. ____

   ____

2. ____

   ____

3. ____

   ____

Please note: If more than three attach a separate sheet.

Did any officer, director, or board member receive compensation? ___________________

Date Updated: 09/13/2024

Business Name: ____

List your accounting method used (Cash, Accrual, Hybrid, or Other)? _______________

Is Non-profit a Calander year filer or Fiscal Year Filer? _________________________

If Fiscal Year, what is the Fiscal Year ___________________________________

Things Hampden Hills Tax & Financial needs for us to setup you up in our systems and to prepare your taxes this year:

1. Your EIN/Federal ID letter from IRS
2. Your profit and loss for the year/s we are preparing
3. Your balance sheet for the year end of the year we are preparing
4. If not on your balance sheet or profit and loss, we need to know how much each owner/partner put into the business per year and took out of the business per year. This is not a paycheck or guaranteed payment to partner but other money.
5. If you have filed a tax return before we need the last tax return you filed (both federal and state/s). We also need the deprecation worksheet as prepared on the tax return.
6. If you have payroll, we need the W-3 & W-2s
7. Your IRS determination letter showing you are a non-profit.
8. Copy of last year's return including the deprecation schedule/worksheet from the return.