

**Intake for Partnerships, Corporations, or Entities taxed as either a
Partnership or Corporation**
(New Clients)

Business Name _____

Business Address _____

City/County _____ Business Phone Number _____

Business Fax _____ EIN _____

Business Email _____

Check one: ___ C Corporation ___ S Corporation
(Taxed as) ___ General Partnership ___ Limited Liability Company
 ___ Limited Liability Partnership ___ Limited Partnership

If you have elected to be taxed as a different entity than you are, what are you legally? _____

Date organized or Incorporated _____ Date business activity started _____

Description of business activity and principal product or service _____

If corporation, state incorporated _____ # of states operated in _____

If S corporation, effective date of election as an S corporation _____

Legal Name – for individuals it is as listed on social security card, social security number/EIN number, address, phone number, and percentage of ownership for each principal shareholder or partner of business:

1. _____

2. _____

3. _____

Please note: If percentage of ownership changed within the tax year, provide details of the change on a separate sheet.

Business Name: _____

Does this business have any foreign partners or shareholders? _____

Did this business pay any taxes to a foreign government during the tax year? _____

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

Is business a Calander year filer or Fiscal Year Filer? _____

If Fiscal Year, what is the Fiscal Year _____

Corporations only answer the following questions:

Is this corporation a personal holding company? _____

Is this corporation a personal service corporation? _____

During the tax year, did the corporation receive a distribution from, or was it the grantor of or transferor to, a foreign trust? _____

Things Needed from Partnerships & Corporations:

ALL Companies:

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 depreciation worksheet as prepared on the tax return.
6. If you have payroll, we need the W-3 & W-2s

Partnerships/LLCs:

1. We need your partnership/LLC agreement
2. You do need an active state charter with the state corporation commission if you are an LLC.

S-Corporations:

1. We need your acceptance letter from IRS where you were accepted as an S-Corp. If you previously filed a tax return, we do not need this.