

In-House Accounting & Tax Services New Tax Client Business Information

Business Legal Name:	
Doing Business As:	
Business Address:	
Mailing Address:	
Email:	
Telephone/Cell#:	
Fax#:	
Business Entity:	<input type="checkbox"/> Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> S-Corp <input type="checkbox"/> C-Corp
EIN/TIN:	
Contact Person:	
Contact Number:	
Email:	

New Business TAX Client Checklist:

- Copy of previous year's tax return (Or most recent filed tax return)
- New client business information
- Copy of Business Profit & Loss
- Mileage Log

Additional List when applicable

- List of depreciable assets
- Accountants Copy of QB (or give access to QB online to ihas@comcast.net)
- Copies of Business Monthly Bank Statements (if haven't been reconciled)
- Copies of Business Credit Card Statements ((if haven't been reconciled)
- Other necessary documents