

Business Information Sheet Tax Year 2025



Filed with our Firm Last Year

New Client

Date _____

① Primary Contact

Full Name _____

Address _____

E-Mail _____

Preferred Phone # _____

② BUSINESS INFORMATION

Name _____

Business Address _____

EIN - Employer Identification Number _____

Entity Type (i.e. 1065, 1120, 1120S) _____

③ Services Required

Bookkeeping _____

Audit Services _____

Consulting Services _____

Tax Preparation _____

Financial Statements _____

Tax Planning _____

④ Owner Information

Owner #1 _____

% of Ownership _____

Owner #2 _____

% of Ownership _____

Owner #3 _____

% of Ownership _____

Owner #4 _____

% of Ownership _____

⑤ Identification

We are required to maintain proof of your identity. Be sure we have a current copy of your Driver's License, a State-issued ID Card, or a Passport.

⑥ Additional Information

If there are any special circumstances that you need to make us aware of, please use the space below:

⑦ Declaration of Responsibilities

In the event of an Audit, you will be responsible for documenting the deductions taken on your Tax Return. Be sure to keep all tax forms, receipts, check images, and/or proof of charitable contributions for at least 4 years. Taxpayers with Real Estate should keep property records for the life of ownership.

I certify that the information and statements provided on this form are true and correct to the best of my knowledge, and that I understand the record keeping requirements.

Signature _____

Date _____