

Intake Form for HOAs

(New Clients)

HOA Name _____

HOA Mailing Address _____

Contact Phone Number _____ Contact Fax # _____

HOA E-Mail _____

EIN _____ State EIN _____

Check one: Incorporated _____ If yes, State _____ Unincorporated _____

Date organized/ Incorporated _____ Date business activity started _____

President & Treasurer Information

Name, social security number/EIN number, address, phone number for President & Treasurer:

1. _____

2. _____

Things Hampden Hills Tax & Financial needs for us to setup you up in our systems:

1. Your EIN/Federal ID letter from IRS (If you have it)
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 (Assets & Liabilities)
4. If you have filed a tax return before, we need the last tax return you filed (both federal and state/s). Not that HOAs normally have them, but if you do we also need the depreciation worksheet as prepared on the tax return.
5. If you have payroll, we need the W-3 & W-2s (Again HOAs normally do not have these)
6. If you filed 1099s, we need a copy of the 1099s and 1096.