

**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? \_\_\_\_\_

**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 depreciation 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 depreciation schedule/worksheet from the return.