Intake Form for Non-Profits

(Returning Clients)

Business Name ____

Business Address____

____

Business Phone Number ______________________________ Business Fax ________________________

EIN_______________________________

Name, social security number, address, phone number, and title for each officer, director, or board member:

1. ____

   ____

2. ____

   ____

3. ____

   ____

4. ____

   ____

Please note: If more than 4 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 deprecation worksheet as prepared on the tax return.
6. If you have payroll, we need the W-3 & W-2s