Intake for Partnerships, Corporations, or Entities taxed as either a Partnership or Corporation (New Clients)

Business Name	
Business Address	
Business Phone Number	Business Fax
EIN State EIN	
Business Email	
Check one: C Corporation	S Corporation
(Taxed as) General Partnership	Limited Liability Company
Limited Liability Partnership	Limited Partnership
If you have elected to be taxed as a different entity than you	are, what are you legally?
Date organized or Incorporated Date business activity started	
Description of business activity and principal product or serv	rice
If corporation, state incorporated	# of states operated in
If S corporation, effective date of election as an S corporation	n
Name, social security number/EIN number, address, phone n principal shareholder or partner of business:	umber, and percentage of ownership for each
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2.	
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3	

Please note: If percentage of ownership changed within the tax year, provide details of the change on a separate sheet.

Business Name:
Does this business have any foreign partners or shareholders?
Did this business pay any taxes to a foreign government during the tax year?
Corporations only answer the following questions:
Is this corporation a personal holding company?
Is this corporation a personal service corporation?
During the tax year, did the corporation receive a distribution from, or was it the grantor
of or transferor to a foreign trust?

Things Needed from Partnerships & Corporations:

ALL Companies:

- 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

Partnerships/LLCs:

- 1. We need your partnership/LLC agreement
- 2. You do need an active state charter with the state corporation commission if you are an LLC.

S-Corporations:

1. We need your acceptance letter from IRS where you were accepted as an S-Corp. If you previously filed a tax return we do not need this.

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