

**Intake for Partnerships, Corporations, or Entities taxed as either a
Partnership or Corporation
(For returning clients)**

Business Name _____

Business Address _____

Business Phone Number _____ Business Fax _____

EIN _____

Business Email _____

Did you change your entity status with IRS since last year? _____

Did you change what you do as a business since last year? _____

Did you operate in any new states last year? _____

Did you change to be taxed as an S corporation last year? (If yes List date effective) _____

(LIST ONLY NEW OWNERS OR SHAREHOLDERS BELOW)

Name, social security number/EIN number, address, phone number, and percentage of ownership for each principal shareholder or partner of business:

1. _____

2. _____

3. _____

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

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

ALL Companies:

1. Your profit and loss for the year/s we are preparing
2. Your balance sheet for the year end of the year we are preparing
3. 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.
4. If you have payroll, we need the W-3 & W-2s

Taxed as an S-Corporation:

1. If you changed to be taxed as an S-Corporation last year or this year, please give us the IRS Notice CP261 showing your election date.