

Intake Form for HOAs

(Returning Clients)

HOA Name _____

HOA Mailing Address _____

Contact Phone Number _____ Contact Fax # _____

HOA E-Mail _____

EIN _____

President & Treasurer Information

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

1. _____

2. _____

Things Needed:

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 (Assets & Liabilities)
3. If you have payroll, we need the W-3 & W-2s (HOAs normally do not have these)
4. If you filed 1099s, we need a copy of the 1099s and 1096.