



CLIENT #: _____

CLIENT DATA SHEET

DATE: _____

ENTITY NAME: _____

FEDERAL ID #: _____

ATTENTION: _____

NEED TO APPLY FOR ID #'s: _____

ADDRESS: _____

PHONE NUMBER: _____

CITY, STATE, ZIP: _____

ALT NUMBER: _____

EMAIL ADDRESS: _____

FAX NUMBER: _____

ALT EMAIL ADDRESS: _____

WEBSITE: _____

DATE ENTITY CREATED: _____

OFFICERS OR PRINCIPALS (INCLUDE TITLE):

YEAR END DATE: _____

BUSINESS ACTIVITY: _____

PRODUCT/SERVICE: _____

ACCOUNTING METHOD: Accrual / Cash / Other

ATTORNEY: _____

PERSON AUTHORIZING ENGAGEMENT:

BANK: _____

PRIOR ACCOUNTANT: _____

REFERRAL SOURCE (check one): None/I'm a current client Internet Referrer: _____

FOR INTERNAL OFFICE USE ONLY:

TYPE OF ENTITY

- | | |
|---|---------------------------------------|
| <input type="checkbox"/> C-Corp | <input type="checkbox"/> S-Corp |
| <input type="checkbox"/> Partnership | <input type="checkbox"/> Individual |
| <input type="checkbox"/> Non-Profit | <input type="checkbox"/> LLC |
| <input type="checkbox"/> Estate | <input type="checkbox"/> LLP |
| <input type="checkbox"/> Trust (type): _____
(Simple, Complex, Grantor, etc) | <input type="checkbox"/> Other: _____ |

WORK TYPE

- | | |
|---|--|
| <input type="checkbox"/> Audit | <input type="checkbox"/> Comp/Write-Up |
| <input type="checkbox"/> Estate | <input type="checkbox"/> FMA |
| <input type="checkbox"/> Income Tax | <input type="checkbox"/> Non-Profit |
| <input type="checkbox"/> Review | <input type="checkbox"/> Trust |
| <input type="checkbox"/> Special Projects | <input type="checkbox"/> Other: _____ |

WORK REQUIRED (Check as it applies)

	M	Q	A
Regular accounting work	___	___	___
Compilation report	___	___	___
Review report	___	___	___
Audit report	___	___	___
Management advisory service	___	___	___
Retirement plan reports	___	___	___
Other: _____	___	___	___

Please Specify (check as it applies)

- | | |
|---------------------------|-------|
| Income taxes – federal | _____ |
| Income taxes – state | _____ |
| Pension & profit sharing | _____ |
| Payroll taxes | _____ |
| W-2's & 1099's | _____ |
| State tax reports | _____ |
| Tax planning & consulting | _____ |
| Management consulting | _____ |
| Computer consulting | _____ |
| Other: _____ | _____ |