

Business Information

Business Name _____
DBA _____ EIN _____
Type of Business (Partnership or Corporation) _____
Physical Address _____ Mailing Address _____

Main Contact Name _____ Phone Number _____
Email Address _____

Partner/Shareholder Information

	Partner/Shareholder	Partner/Shareholder
Social Security Number	_____	_____
First Name	_____	_____
Last Name	_____	_____
Address	_____	_____
	_____	_____
Percentage of Ownership	_____	_____
	Partner/Shareholder	Partner/Shareholder
Social Security Number	_____	_____
First Name	_____	_____
Last Name	_____	_____
Address	_____	_____
	_____	_____
Percentage of Ownership	_____	_____

Do you authorize us to discuss your return with the IRS? (Yes , No)

Additional Information

Have you dealt in Virtual Currency (Bitcoin, Ether, Roblox, V-bucks, etc.)? (Yes, No)
Would you like to receive text messages/reminders? (Yes, No)

Preferences:

Method of Contact: Email _____ Mail _____ Call _____ Text _____
Tax Return Disposition: Email/ShareFile _____ Client Pickup _____ Mailed _____
Tax Return Signature: Email _____ In Person _____ Electronic Signature _____ Paper Copy _____

Please mark any additional services you may be interested in receiving.

_____ Bookkeeping (monthly, quarterly, annually) _____ Payroll Services _____ Business Plan Consultation

Additional notes: