



New Client Paperwork

Welcome! We are so happy to have you on board. Now here's the fun part—paperwork.

Name:

Business Name:

Business Address:

Business Telephone: _____

Preferred number to text: _____

Business Email: _____

Can we send all information to the above email address? Yes No

Other Authorized Contacts:

Business Entity: Single Member LLC Multi-member LLC Sole Proprietorship
Partnership S-Corp LLC treated as an S-Corp C-Corp

Date of formation: _____ **EIN:** _____

SOS #: _____

First date you hired an employee: _____

First date you paid an employee: _____

Do you sell any products? Yes No

Do you currently have a sales tax number? Yes, it is _____ No

Does your business currently require any other state tax forms that you know of?

Yes _____ No

