



**ALL CLIENTS – MAIN CONTACT:**

Check best method of contact

Name: \_\_\_\_\_  email: \_\_\_\_\_  
 First M Last

Billing Address: \_\_\_\_\_

Preferred Phone: \_\_\_\_\_  Alternate Phone: \_\_\_\_\_

Who can we thank for referring you to us? \_\_\_\_\_

**BUSINESS ENTITY TAX CLIENTS:**

Entity Name: \_\_\_\_\_ Federal EIN: \_\_\_\_\_

Doing Business As (dba): \_\_\_\_\_

Entity Type:  Corporation\*  S Corporation\*  Partnership  LLC  Exempt \*

Fiscal Year End: \_\_\_\_\_

- **\*New Corporations** please provide incorporation documents
- **\*S Corporations** please provide **Sub S Election acceptance**
- **\*Exempt Organizations** please provide a copy of the **IRS Determination Letter**
- **New Entities** please provide a copy of your Signed SS4 and IRS EIN Assignment

Billing / IRS Address: \_\_\_\_\_

Main Phone: \_\_\_\_\_ Web Site \_\_\_\_\_ Foreign Bank Acct? \_\_\_\_\_

Bookkeeper Contact Info: \_\_\_\_\_

Bookkeeper Email Address: \_\_\_\_\_

QB's Version: \_\_\_\_\_ Password: \_\_\_\_\_  PC  Mac

**AS A NEW CLIENT, PLEASE READ AND SIGN THE ATTACHED LETTER OF ENGAGEMENT.  
 IN ADDITION, A RETAINER MAY BE REQUIRED.**

For office use only: Client Number: \_\_\_\_\_ UT: \_\_\_\_\_ FC: \_\_\_\_\_ PRACTICE: \_\_\_\_\_

Notes/Engagements/Projects from CPA:

Staff Assignment from CPA:

**Vashon Island**

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