



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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San Juan Island

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