



We would like to take this opportunity to welcome you as a new client and to thank you for your business. We look forward to being of service to you, now and in the future.

Please print clearly

Date _____

Business / Non-Profit name _____

What type of entity do you have? S corp _____ C corp _____ Partnership _____ LLC _____ Exempt _____

Federal ID Number _____ State Employment Number _____

Secretary of State Number _____ State Sales Tax Number _____

What State did you incorporate in? _____ Exempt Entity Charitable Registry Number _____

Contact Person _____ Title _____

Address _____

City _____ State _____ Zip Code _____

Business Phone _____ Cell Phone _____

E-mail _____

Do you have a corporate book Yes _____ No _____ Where is it located _____

Preferred Method of Contact _____

Are you a returning client? Yes _____ No _____

Referred by _____

****Please provide us with a copy of the IRS FEIN letter****

*We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

A Professional Accountancy Corporation