



Get More, Expect More

Business Client Info Sheet

Company Info

Organization Name	
Trade Name	
Company Phone	
Company Fax	
Company Website	
Address (Billing)	
Address (Location, if different)	

Main Contact

Main Contact Name	
Main Contact Email	
Main Contact Phone	

Additional Information

What does your company do?	
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Entity Info - Federal

EIN - IRS Number	
EIN Approval Date	
Income Tax Form (Circle)	SCH C (SINGLE) 1065(PARTNER) 1120S(SCORP) 1120 (CORP) 990 (NONPROF)
941 Filing Frequency (Circle)	MONTHLY QUARTERLY
940 Filing Frequency (Circle)	MONTHLY QUARTERLY ANNUAL
Accounting Method-Inc Tax	CASH ACCRUAL

Entity Info - State

Tax State	
GET Number	
DCCA Date	
DOL Number - HI State	
GET Filing Freq (Circle)	MONTHLY QUARTERLY SEMI- ANNUAL
Accounting Method - GE Tax	CASH ACCRUAL
SWT Filing Freq (Circle)	MONTHLY QUARTERLY SEMI- ANNUAL

Owners

Contact/ Owner 1 Info	Name:	
	Address:	
	Phone:	
	Email:	
Contact/ Owner 2 Info	Name:	
	Address:	
	Phone:	
	Email:	
Contact/ Owner 3 Info	Name:	
	Address:	
	Phone:	
	Email:	