

NEW BUSINESS CLIENT DOCUMENT REQUEST FORM

For The Business

▶ Permanent File Information

Articles of Organization/Incorporation
(if you already have them)
Personal Financial Statements
Contact Information for Additional
Owners/Partners
Operating Agreement
Buy Sell Agreement
By-Laws
EIN Letter
S-Acceptance Letter (if applicable)

▶ Tax Information

2 Years of Prior Tax Returns
Previous Tax Advisor Contact
Information

▶ Accounting Information

Previous Year Financial Statements
QuickBooks Login Information
Backup of QuickBooks File
Latest Interim Financial Statements
State Unemployment ID
Online Access with Client Business Bank
Account or Recent Back Statements

▶ Accounting Information

Previous Year Financial Statements
QuickBooks Login Information
Backup of QuickBooks File
Latest Interim Financial Statements
State Unemployment ID
Online Access with Client Business Bank
Account or Recent Back Statements

For The Individual

▶ Personal Information

Taxpayer's SSN/TIN Numbers and DOB
Spouse's SSN/TIN Numbers and DOB
Dependent's SSN/TIN Numbers and DOB
Driver's License(s)
2 Prior Year Tax Returns
Details of any interest in foreign accounts
and/ or virtual currency