storenfinancial new business client information

main business information

office use only

date: ____________________
client ID: ________________
preparer: ________________
business industry code:
____

federal ID: ________________________

business entity: ☐ individual ☐ llc ☐ s corporation ☐ other

legal business name: ____

dba: ____

business mailing address ____

city: ____ state: ______________ zip: ________________________

business physical location if different from above: ____

business service/product: ____

phone: ____ fax: ____

primary contact information

primary contact name: ____

address (if different) ____

city: ____ state: ____________ zip: ________________________

ss# or tax id#: ____ % of ownership: ______________________________

title: ____ active: yes ☐ no ☐

email: ____ phone: ____

does this business currently have employees? ☐ yes ☐ no ☐ don't know

Items we may need: (all may not apply)

- ☐legal documentation of entity including bylaws and articles
- ☐IRS confirmation of tax id
- ☐state withholding tax id
- ☐quarterly payroll records
- ☐prior year depreciation schedules
- ☐income statements
- ☐balance sheets
- ☐Copy of prior tax returns for the past 2 years
- ☐Copy of previous business personal property return filed with the county.

notes: ____
____
____
____
____

*if there are multiple partners/officers please complete section on page 2

additional partners/officers--please list all

name: ______________________________

address: ______________________________

city: ______________ state: ________ zip: ________

ss# or tax id #: ______________ % of ownership: ______________

title: ______________ active? yes ☐ no ☐

☐ individual ☐ llc ☐ s corporation ☐ trust ☐ other

name: ______________________________

address: ______________________________

city: ______________ state: ________ zip: ________

ss# or tax id #: ______________ % of ownership: ______________

title: ______________ active? yes ☐ no ☐

☐ individual ☐ llc ☐ s corporation ☐ trust ☐ other

name: ______________________________

address: ______________________________

city: ______________ state: ________ zip: ________

ss# or tax id #: ______________ % of ownership: ______________

title: ______________ active? yes ☐ no ☐

☐ individual ☐ llc ☐ s corporation ☐ trust ☐ other

name: ______________________________

address: ______________________________

city: ______________ state: ________ zip: ________

ss# or tax id #: ______________ % of ownership: ______________

title: ______________ active? yes ☐ no ☐

☐ individual ☐ llc ☐ s corporation ☐ trust ☐ other

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What should I provide for my **business** tax return?

_____ Gross receipts from sales or services (Form 1099-K or 1099-Misc)
_____ Business checking/savings account interest (1099-INT or statement)
_____ Other income
_____ Inventory on hand (cost) at December 31st
_____ Inventory purchases
_____ Amount used for personal purposes
_____ Materials & Supplies
_____ Business trip (mileage) log
_____ Amounts paid to subcontractors (Form 1099-Misc)
_____ Asset Information
  _____ Purchases over $2500 with cost & first date of business use
  _____ Sales price & disposition date of any assets sold
_____ Interest expense from bank loans, business loans, mortgages, and credit cards
_____ Rent expense
_____ Office-in-home info
  _____ Square footage of office space and total square footage of home
  _____ Mortgage interest or rent paid, insurance, and utilities
  _____ Cost of home, separate improvements and first date of business use
_____ Wages paid to employees (Forms W-2 and W-3 and Federal and state payroll returns-Forms 940, 941,etc)
_____ Estimated tax payments made
_____ Health insurance premiums paid
_____ Meals and entertainment expenses
_____ Payments to retirement plans
_____ Any other ordinary and necessary business expenses
_____ Tax returns & depreciation schedules from the past 2 years, if this is your first visit