

Legal business name: \_\_\_\_\_ Employer ID Number (EIN) \_\_\_\_\_

DBA name (if different): \_\_\_\_\_ Industry \_\_\_\_\_

Business entity type (check one):  LLC  Corporation  Series LLC  None of these

If this is a newly formed entity, have you paid the \$100 Privilege Tax to AL and filed Form BPT-IN?  Yes  No

What state was your entity organized in? \_\_\_\_\_ Other states where it is registered? \_\_\_\_\_

Business Location Address \_\_\_\_\_ City, State, ZIP \_\_\_\_\_

Mailing Address (If different) \_\_\_\_\_ City, State, ZIP \_\_\_\_\_

What is your accounting system?  QB Desktop  QB Online  Excel  Other \_\_\_\_\_

1<sup>st</sup> Business owner:

Name \_\_\_\_\_ Ownership % \_\_\_\_\_ Title (e.g., President, Member, etc.) \_\_\_\_\_

E-mail \_\_\_\_\_ Cell Phone \_\_\_\_\_ DOB \_\_\_\_\_ SSN \_\_\_\_\_

Home address \_\_\_\_\_ City, State, ZIP \_\_\_\_\_

Weekly hours worked in this business \_\_\_\_\_ Weekly hours worked elsewhere \_\_\_\_\_

Interested in having us do your personal 1040?  Yes  No *This is required for single member businesses.*

2<sup>nd</sup> Business owner or other important contact:

Name \_\_\_\_\_ Ownership % \_\_\_\_\_ Title (e.g., President, Member, etc.) \_\_\_\_\_

E-mail \_\_\_\_\_ Cell Phone \_\_\_\_\_ DOB \_\_\_\_\_ SSN \_\_\_\_\_

Home address \_\_\_\_\_ City, State, ZIP \_\_\_\_\_

Weekly hours worked in this business \_\_\_\_\_ Weekly hours worked elsewhere \_\_\_\_\_

Interested in having us do your personal 1040?  Yes  No *This is required for single member businesses.*

For additional owners:

Name \_\_\_\_\_ Ownership % \_\_\_\_\_ Title (e.g., President, Member, etc.) \_\_\_\_\_

Name \_\_\_\_\_ Ownership % \_\_\_\_\_ Title (e.g., President, Member, etc.) \_\_\_\_\_

Name \_\_\_\_\_ Ownership % \_\_\_\_\_ Title (e.g., President, Member, etc.) \_\_\_\_\_

Name \_\_\_\_\_ Ownership % \_\_\_\_\_ Title (e.g., President, Member, etc.) \_\_\_\_\_

Primary Contact (If different):

Name \_\_\_\_\_ Phone # \_\_\_\_\_

E-mail \_\_\_\_\_ Title (e.g., President, LLC Manager, etc.) \_\_\_\_\_

What are your financial goals? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_