

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 _____

1st 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.*

2nd 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? _____

