

2022 Business Information 2022

NEW CLIENT(S)? <input type="checkbox"/> YES <input type="checkbox"/> NO			
<u>Business Name:</u>	<u>2nd Contact</u>		
Business Name: _____	2nd Contact Name: _____		
Business EIN: _____	2nd Contact Cell: _____		
How Many Partners / Owners : _____	_____		
Company Phone: _____	_____		
Main Contact Name: _____	E-mail: _____		
Main Contact Cell: _____	(Important for file status updates/general communications.)		
E-mail: _____	(Important for file status updates/general communications.)		
Filing Address (for IRS residency purposes):			
Address: _____			
City: _____ State: _____ Zip Code: _____			
Mailing Address if <u>Different</u> (for us to send your copy of the tax return and invoice):			

Partners or Owners:			

Full Name	Social Security #	%Share of Company	Address
Filing Status:			
<input type="checkbox"/> 1120 <input type="checkbox"/> 1120-S <input type="checkbox"/> 1065 <input type="checkbox"/> Schedule C <input type="checkbox"/> 990			
Questions: Please circle one			
Did any of the partners/owners take distributions during the year?			(Y)(N)
Did your company make any payments in 2022 that would require you to file Form 1099?			(Y)(N)
If Yes, did the 1099s get filed?			(Y)(N)
Did your company have any debt that was forgiven in 2022?			(Y)(N)
Notes:			
Referred by:			