

## 2021 Business Information 2021

**NEW CLIENT(S)?**  YES  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 Different (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:**  
 1120     1120-S     1065     Schedule C     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 2020 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 2020? (Y)(N)

**Notes:**

**Referred by:** \_\_\_\_\_