



## SUE RICHARDSON ACCOUNTING

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### CLIENT INTAKE FORM

Date: \_\_\_\_\_

Business Name: \_\_\_\_\_ When did your business start? \_\_\_\_\_

Briefly describe what your company does: \_\_\_\_\_

Business Type: Sole Proprietor\_\_\_\_ LLC\_\_\_\_ Partnership\_\_\_\_ Corporation\_\_\_\_ S-Corp\_\_\_\_ N-Profit\_\_\_\_

Federal ID Number (EIN): \_\_\_\_\_ State ID Number (WEIN): \_\_\_\_\_

Business Mailing Address: \_\_\_\_\_

Business Physical Address: \_\_\_\_\_

Business Phone: \_\_\_\_\_ Business Fax: \_\_\_\_\_

Business E-Mail: \_\_\_\_\_ Business Website: \_\_\_\_\_

Business Contact 1: \_\_\_\_\_ Phone: \_\_\_\_\_

Business Contact 2: \_\_\_\_\_ Phone: \_\_\_\_\_

Do you file federal taxes on a cash or accrual basis? \_\_\_\_\_

What bank is your main business account with? \_\_\_\_\_

Routing Number \_\_\_\_\_ Checking Account Number \_\_\_\_\_

Number of Employees: \_\_\_\_\_ Pay Period Schedule: \_\_\_\_ Weekly \_\_\_\_ Bi-Weekly \_\_\_\_ Monthly

Day Pay Period Starts: \_\_\_\_\_ Day Pay Period Ends: \_\_\_\_\_ Check Date: \_\_\_\_\_

SUI Number \_\_\_\_\_ SUI Rate \_\_\_\_\_

What services are you looking for us to provide?

Business Start-Up Assistance

Financial Statements

Payroll & Payroll Tax Reporting

Sales Tax Reporting

Income Tax Preparation