

John Gallo CPA LLC

New Client Information Sheet - Business

Name of Business _____

Any DBA (doing business as names) _____

Federal EIN (employer identification number) _____

State ID number _____

Address _____

Phone number: _____ Fax: _____

Contact person _____

Email address: _____

Website address: www. _____

Date business started _____

Type of organization LLC Sole Proprietorship Corporation
S-Corporation Not for Profit Other Not yet organized

If LLC how are you taxed? Sole Proprietorship Partnership S-Corp

Owners: Name Address SSN

Principal business activity _____

Product or service provided _____

Do you file sales tax returns? _____

Number of employees _____

Is Payroll performed in house or by a service? _____

How often are employees paid? _____

Name of accounting software used if any _____

Annual Sales Last year _____

Estimated number of checks written or payments made per month _____

Estimated number of sales invoices per month _____

Estimated number of bank deposits per month _____

Number of bank accounts _____

Is your business checking account used to pay personal expenses _____

Do you have business credit card(s) _____

Are personal expenses ever charged on the business credit cards _____

Are personal credit cards used to pay business expenses _____

How often to you need financial statements? Monthly Quarterly Annually

Have you used an accountant in the past?

If so, can we contact them?

Old accountants Name Phone and

Email _____

Do you have a business plan _____

Do you have a mission statement _____

Do you have a vision statement _____

Please provide copies of the above 3 items if you have them along with recent tax returns, financial statements, and depreciation schedules