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\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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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

If you have submitted a form 2553 form provide a copy.

Also provide copy of most recently filed tax return.

Owners: Name Address SSN Attach additional pages if necessary

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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?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do you use independent contractors or contract labor?\_\_\_\_\_\_\_

Do you use a personal vehicle for business?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do you use an office or storage space in your home?\_\_\_\_\_\_\_\_\_

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**