

New Business Intake Sheet

Entity Name: _____

FEIN: _____

Address: _____

Primary Phone: _____

Alternate Phone: _____

Primary Email: _____

Alternate Email: _____

Entity Type (Circle one): C-Corp S-Corp LLC Sole Proprietor

If you chose LLC, did you make the S-Election to be treated as an S-Corp for tax purposes? (Circle one) Yes or No

Date S-Election was made: _____

Date of Incorporation: _____

How many Shareholders or Members does the business have? _____

Are you currently using any bookkeeping software? (Circle one)

Yes or No

If yes, please specify which software and version you use.

Please fill out the Shareholder/Member information on the following page.

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Shareholder/Member Info:

Name: _____
Address: _____
Phone: _____
Email: _____
SSN: _____
Country of Citizenship: _____
Percentage of ownership/number of shares owned: _____

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If you are a new or existing business and **HAVE NOT** applied for employer status, registered to collect and/or pay re-employment tax, and/or sales and solid waste tax, **STOP HERE.**

If you are a new or existing business and **HAVE** applied for employer status, registered to collect and/or pay re-employment tax, and/or sales and solid waste tax, **continue to the next page.**

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Do you have employees? (Circle one) Yes or No

If yes, how many? _____

If no, do you plan to? (Circle one) Yes or No

Payroll processing (Circle one):

- Payroll Service
- Leasing Company
- Self-Prepared
- Accountant Prepared

If Self-Prepared or Accountant Prepared, please provide the following:

- State Unemployment number: _____
- Business Partner number: _____
- EFTPS PIN and Password: _____
- State Login ID: _____
- State Password: _____

Are you required to collect and/or pay Sales/Solid Waste Tax? (Circle One)

Yes or No

If yes, circle all that apply:

- Sales and Use Tax
- Solid Waste Tax

Sales/Solid Waste Tax Processing (Circle one):

- Self-Prepared or Accountant Prepared

Please provide the following:

- Sales Certificate number: _____
- Business Partner number: _____
- Login ID: _____
- Password: _____