There is basic information we need to collect from every new business. Please help us by filling out our new business form. The goal is to make this as simple as possible for you. Please contact us with any questions or concerns.

Business Information



Business Name and Type: Please use exact name registered with the State. Type of business meaning (ex. LLC, S Corp, C Corp, Sole Proprietor, DBA)

Main services provided by Business:

Your Name and Title:

Phone Number:

Email address:

Mailing Address:

Date Established:

FEI/EIN Number:

Copy of last tax return(s) filed:

Bank Account Info for tax return direct deposit: (copy of voided check or account and routing numbers)

Income/Expenses: Please provide us with Profit and Loss statement and balance sheet for end the year.

Deductions: We will need a complete list of your business expenses. Please use one of the appropriate forms provided on our “Tax Tools” page to categorize properly. \*\* Attach to this page and send together.

Liability and Assets: Any purchase made over $5000 for business and outstanding loans. (ex. Property, Vehicles, Equipment etc.)