

BUSINESS INFORMATION SHEET

PRIVILEGED & CONFIDENTIAL — TO BE RETAINED IN PERMANENT FILE

1. Business Information:

EIN: _____

Business Name: _____

Street Address: _____ Suite # _____

City: _____ State: _____ Zip Code: _____

Email Address: _____

Foreign Province (if applicable): _____

Foreign Country (if applicable): _____

2. Shareholder/Partner 1:

Social Security Number: _____

Full Legal Name: _____

Daytime Phone #: _____

3. Shareholder/Partner 2:

Social Security Number: _____

Full Legal Name: _____

Daytime Phone #: _____

4. Shareholder/Partner 3:

Social Security Number: _____

Full Legal Name: _____

Daytime Phone #: _____

5. Shareholder/Partner 4:

Social Security Number: _____

Full Legal Name: _____

Daytime Phone #: _____

Office Use:

Tax Return: 1120 _____ 1041 _____ 1120S _____ 990 _____ 1065 _____ 5500 _____ Due Date: _____	Property Tax Return _____ County Due: _____ Sales Tax: Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Fed Deposit Due: Monthly <input type="checkbox"/> Semi-weekly <input type="checkbox"/> Payroll Tax: 941 Due _____ quarterly 940 due 2/28/____ NC-3 due _____ NC U1 101 due _____ quarterly NC-5 Monthly <input type="checkbox"/> W-2 and W-3 due: _____ Quarterly <input type="checkbox"/>
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