

21021 Spring Brook Plaza Dr., Ste 172  
Spring, Texas 77379



(281) 288-9982 (Tel)  
(866) 377-6343 (Fax)

---

## NEW CLIENT INTAKE QUESTIONNAIRE BUSINESS

Have you created any of the following entities?    \_\_\_\_ Yes    \_\_\_\_ No

1. LLC
2. Corporation
3. Partnership
4. Sole Member, Disregarded
5. Trust

If yes, who created the entities?

1. Anderson Advisors
2. Big Dog
3. Other \_\_\_\_\_

How many current entities do you hold? (Please provide the number of types below)

1. LLC \_\_\_\_\_
2. Corporation \_\_\_\_\_
3. Partnership \_\_\_\_\_
4. Sole Member, Disregarded \_\_\_\_\_
5. Trust \_\_\_\_\_

Do you currently use or plan on subscribing to QuickBooks Desktop or QuickBooks Online?

\_\_\_\_ Yes    \_\_\_\_ No

If yes, please chose one:    \_\_\_\_ Desktop    \_\_\_\_ Online

Are you going to need bookkeeping services?  Yes  No

If yes, please choose the type:

Monthly

Quarterly

Quarterly Review

Yearly Tax Review

Other Explain: \_\_\_\_\_

Do you currently have Payroll Services: **Yes** or **No**

If Yes, which Payroll Software are you currently using?

QuickBooks Online

Paychex

ADP

Gusto

QuickBooks Desktop

Other: \_\_\_\_\_

If No, have you been advised to take Payroll? **Yes** or **No**

**Additional notes regarding Payroll Services:**

**We ask that you provide the following documentation to our office upon acceptance of our services:**

1. **ALL** formation documents from Anderson Advisors or Big Dog, IF applicable
2. Certificate of Filing, Office of the Secretary of State
3. Certificate of Formation, Office of the Secretary of State
4. Federal EIN Documentation
5. Operating Agreement
6. **For Texas Entities:** Texas Franchise (Web File Number) must be provided. If you need assistance locating this document, contact your registered agent. You may also request this document by contacting the Texas Comptroller's Office at 1 (800) 442-3453.

***DISCLOSURE*** – *We will not be able to properly process your business information in our systems without ALL required documentation. Without the proper documentation we cannot file timely extensions, tax returns, or other necessary reports and will not be held liable for penalties or interest due from a lack of required documents.*

**Additional Information Requests:**

1. All Prior Year Tax Returns (minimum prior year return)
2. All Tax-Related Documentation for the Current Tax-Year

**Provide your Contact Information:**

Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Primary Email: \_\_\_\_\_

Secondary Email (Required): \_\_\_\_\_

Note: Circle your preferred method of contact.

Phone *or* Email

**Additional Notes:**