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Spring, Texas 77379



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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 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 No

Will you need Payroll Services: Yes No

Additional notes regarding Payroll Services:

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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. Copies of any IRS entity classification change form (example: Form 2553 or Form 8832) and their acceptance letters.
7. **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.
8. If Partnership (1065), S Corporation (1120S), C Corporation (1120) please send a list of partners/shareholders or copies of completed W9s:
 - Name or Business name
 - Email address
 - Mailing address
 - Social security numbers or EIN number

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. Copy of your previously filed business tax 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: