

Corporate Data Sheet

Business Information

Business Name _____ EIN # _____

Business Address _____

City, State _____ Zip Code _____

Business Phone _____ Fax # _____

Email _____ Web Site _____

Mailing Address _____

City, State _____ Zip Code _____

Please describe Your Business in Detail _____

How do you keep track of your Business Income and Expenses? Please check Below

QuickBooks Online QuickBooks Desktop Excel Sheets Other _____

(Please Check Yes or No below. If you require Bookkeeping, Payroll & Sales Tax Service, also fill out page 3)

<p>Are you selling Services to your client/customers? Y or N</p> <p>Do you require our firm to do your bookkeeping? Y N</p> <p>Do we need to do your Payroll w2's and or 1099's? Y N</p>	<p>Are you selling Products to your client/customers? Y or N</p> <p>Do we need to file sales tax for your company? Y N</p> <p>Do you file your Business Use Tax/Tangible Tax? Y N</p>
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Company Owner/Partner Information

(Please fill out all information about Owners/Partners)

1. Owners Full Name _____

Title/Position _____ Address _____

% of Ownership _____ City, State, Zip _____

Social Security # _____ Cell Phone # _____

Date of Birth _____ Email _____

2. Owners Full Name _____

Title/Position _____ Address _____

% of Ownership _____ City, State, Zip _____

Social Security # _____ Cell Phone # _____

Date of Birth _____ Email _____

3. Owners Full Name _____

Title/Position _____ Address _____

% of Ownership _____ City, State, Zip _____

Social Security # _____ Cell Phone # _____

Date of Birth _____ Email _____

4. Owners Full Name _____

Title/Position _____ Address _____

% of Ownership _____ City, State, Zip _____

Social Security # _____ Cell Phone # _____

Date of Birth _____ Email _____

5. Owners Full Name _____

Title/Position _____ Address _____

% of Ownership _____ City, State, Zip _____

Social Security # _____ Cell Phone # _____

Date of Birth _____ Email _____

Business Name _____ Start date for the write-up: _____

Please list your primary contacts below:

Name: _____	Email Address: _____	Phone: _____
_____	_____	_____
_____	_____	_____

QuickBooks Information

- If online, we need an accountant’s invitation, please send to bookkeeping@plrcpas.com
- If desktop, send a Full backup of the most recent QuickBooks version to <https://spaces.hightail.com/uplink/plrcpas>

Bank Name: _____	Account Number: _____	Login username	Password
_____	_____	User: _____	P/w: _____
_____	_____	User: _____	P/w: _____
_____	_____	User: _____	P/w: _____

Credit Card Company	Account Number:	Login username	Password
_____	_____	User: _____	P/w: _____
_____	_____	User: _____	P/w: _____
_____	_____	User: _____	P/w: _____

Loans/Line of Credit:		Login username	Password
_____	_____	User: _____	P/w: _____
_____	_____	User: _____	P/w: _____

Additional comments/details: _____

Do you require us to Do your QuickBooks	Monthly	Quarterly	Annually	
Bookkeeping will be billed (Office use Only)	Monthly	Quarterly	Annually	\$ _____

Payroll Information

Current Payroll company you will be using _____ or
 For information on us doing your payroll please contact John.Quinones@PLRCPAs.com
 Additional comments/details: _____

Sales Tax Information

Current Sales tax ID#/credentials _____ and
 For information on us doing your sales tax please contact Debbie.Palermo@PLRCPAs.com
 Additional comments/details: _____