

Byrd Accounting
www.byrdaccounting.biz
407-656-5400

Welcome New Client!

Business Name:

DBA:

Mailing Address:

Physical Location if different:

Type of business organization: _____

(Sole Proprietor, Partnership, S Corporation, LLC)

Company contact person:

Best number to reach contact:

Best email for contact:

Other officers or members of company:

Additional Information

Federal:

State:

EIN: _____

BPN: _____

Sales Tax Number: _____

RT-N: _____

Registration Information:

EFTPS: PIN _____

Password: _____

Sales Tax: UN _____

Password: _____

Re-employment UN _____

Password: _____

Bank Accounts and numbers:

Quickbooks:

Version: _____

Year _____

QBO: User name: _____

PW _____

Items we might need:

Copy of previous year business return including depreciation schedule.

For current period:

- Bank statements

- Check register or stubs

- Credit Card Statements

- Any payroll returns previously filed for current year

- Any sales tax returns previously filed for current year

- Any correspondence from IRS or State that needs a reply

- Employee W2 forms

- Any completed W9 forms

- Cash receipts

- Sales Journal, invoices