

NEW ACCOUNT SET-UP INFORMATION

CORPORATE NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP CODE \_\_\_\_\_ COUNTY \_\_\_\_\_

TOTAL SHARES \_\_\_\_\_ PRINCIPAL ACTIVITY \_\_\_\_\_

CELL # \_\_\_\_\_ BUS # \_\_\_\_\_ FAX # \_\_\_\_\_

CONTACT NAME \_\_\_\_\_ EMAIL \_\_\_\_\_

EMAIL TAX RETURNS OR FINANCIAL STMTS TO: \_\_\_\_\_

SHAREHOLDERS/MEMBERS

NAME \_\_\_\_\_ TITLE \_\_\_\_\_

ADDRESS \_\_\_\_\_

CELL # \_\_\_\_\_ S.S.# \_\_\_\_\_

OWNERSHIP % \_\_\_\_\_

NAME \_\_\_\_\_ TITLE \_\_\_\_\_

ADDRESS \_\_\_\_\_

CELL # \_\_\_\_\_ S.S.# \_\_\_\_\_

OWNERSHIP % \_\_\_\_\_

INTERNAL USE ONLY

FORMS TO BE COMPLETED

_____ SS-4	_____ SALES TAX
_____ 1065 (LLC)	_____ LLC: ARTICLES OF ORG
_____ 2553 & 8832 (IF LLC)	_____ CORP: ARTICLES OF INC
_____ 2848	_____ STATE UNEMPLOYMENT
_____ ACCTG CLIENT	_____ NEW ACCOUNT LIST

MONTHLY \_\_\_\_\_ QUARTERLY \_\_\_\_\_ ANNUAL \_\_\_\_\_ FEE QUOTE \_\_\_\_\_

PICK UP \_\_\_\_\_ DROP OFF \_\_\_\_\_ MAIL IN \_\_\_\_\_