DATE: ___________________ **FILE CABINET ID** __________________________

Payment is due at the time services are rendered

BUSINESS INFORMATION

Name: ____ Federal ID #: ____

Type of Entity: (circle one) Corporation: _____ C _____ S Partnership: _____LP _____GP Trust SMLLC

Physical Address: ____

Mailing Address: ____

Phone: (_________) ______________________ Fax: (_______) ___________________ Year End: _____________

Is an EFTPS account already established? _____ yes _____no If not, please provide the following information:

Bank Name: ____________________________ Routing # ________________________ Account #______________________

Contact Person: ____

Email Address: ____

Referred by: ____

PERSONAL INFORMATION

** Copies required for new clients

BUSINESS OWNER/PARTNER INFORMATION:

Name: ____ SS#: **__________________________________

Driver's License #: **____________________ Ex Date: ___________ Date of Birth: ____________________________

Address: ____

City, State Zip: ____ Phone (hm): ____________________________

(work) ____ (Cell) ___________________________________

Email Address: ____

Title: ____

BUSINESS OWNER/PARTNER INFORMATION:

Name: ____ SS#: **__________________________________

Driver's License #: **____________________ Ex Date: ___________ Date of Birth: ____________________________

Address: ____

City, State Zip: ____ Phone (hm): ____________________________

(work) ____ (Cell) ___________________________________

Email Address: ____

Title: ____

*****OVER*****

As a new client with Baity & Assoc., we want to ensure we are providing for all your personal or business needs. Please mark the areas below that you have questions about, or would like information on:

_____ Bookkeeping

_____ Quarterly payroll reporting, W-2's & 1099's

_____ Financial Statements

_____ Tax preparation: Individual, Corporate, Partnership, Trust, Estate, Gift, and Non-profit Organizations

_____ Personal Property Renditions

_____ Vehicle Renditions

_____ Tax planning and consulting

_____ Formation of a business (Inc., LLC or LP – with our Legal Affiliates)

_____ Dissolution of a business (Inc., LLC or LP – with our Legal Affiliates)

_____ IRS resolution - tax issues between Internal Revenue Service and the taxpayer

_____ State of Texas resolutions – issues between State of Texas and taxpayer

_____ Sales Tax

_____ Notary public services

_____ QuickBooks™ set up for a business

_____ QuickBooks™ training for staff

_____ QuickBooks™ on-site / in house / remote analysis