

Today's Date _____

Time in: _____

Which Office did you visit today?

____ 3415 Custer Rd Suite 195
Plano, TX 75023

____ 9410 Walnut St. Suite 112
Dallas, TX 75243

Contact Information

Taxpayer's Information:

First Name: _____ Last name: _____

Occupation: _____ Date of Birth: _____

SSN/ITIN: _____ DL / ID: _____ State: _____

Phone #: _____ Email: _____

Home Address: _____ City: _____ Zip: _____

Business Needs

___ Business Formation

___ Business Consulting

___ Business Taxes

___ Bookkeeping

___ Payroll

___ Sales Taxes

Business Information

(Skip to the last section if not an Entity)

Business Name: _____ Second Choice: _____

DBA: _____ EIN: _____ Formation Date: _____

Entity type: ___ C-corp ___ LLC ___ Sole Proprietor ___ LLP ___ Partnership ___ Non-Profit ___ Trust ___ S-corp

NAICS Code: _____ Principle Activity: _____ Phone #: _____

Accounting Method: ___ Cash ___ Accrual ___ Other _____ Email: _____

Business Address: _____ City: _____ Zip: _____

Registered Agent Information

Registered Agent Info: ___ Organization or ___ Individual

Organization Name: _____

First Name: _____ M.I. _____ Last name: _____ Suffix _____

Office Address: _____ City: _____ State: _____ Zip: _____

Franchise Tax Information

Do you need you Franchise and Public Report for the State of Texas filed? ___ Yes ___ No or ___ I don't know.

Taxpayer #: _____ Secretary of State file #: _____ Webfile # _____

So, we may better serve you.

Have you ever been audited by the IRS?

Are you concerned about Identity theft for yourself or your employees?

Do you have questions about growing a business?

Have you thought about offering company benefits (health, life and legal) for you or your employees?

Are you interested in building business credit?

Do you have an exist strategies?

Do you have a trust or Will set up for your business or yourself?

I _____ testify that all information provided is true and accurate to the best of my knowledge. I know that providing falsified information to my tax professional is a federal crime punishable by fines and or imprisonment.

Signature

Date

Signature

Date

Disclosure:

The information contained on this form is for the sole use of the above individual(s) or entities and may contain propriety, privileged and/or highly confidential information. Any unauthorized dissemination, review, or copying of these communications are strictly prohibited.