

Cypress Bay Accounting, Inc.

Professional Accounting Services

New Client Information Checklist

Company _____

Contact Person _____

____ LLC - Form 8832

____ S-Corp - Form 2553

____ S-Corp acceptance letter

____ Articles of incorporation or partnership/operating agreement?

____ EIN?

____ Prior Year Tax Return

____ Depreciation Schedule

____ Tangible Tax Return

____ Software back-up

____ Password

____ Power of Attorney for IRS

____ Power of Attorney for FDOR

Payroll:

____ Copies of current year filings.

____ EFTPS login/passcode

____ FDOR File & Pay login/passcode

____ Reporting Agent Authorization

Sales Tax:

____ Copies of current year filings

____ FDOR File & Pay login/passcode