

Cypress Bay Accounting, Inc.

Professional Accounting Services

New Client Information

Name/Company _____

Address _____

Owner Name(s), Contact Info, percentage of ownership (if applicable)

What is the best way to contact you? _____

What is your e-mail address? _____

Do you check your e-mail daily? _____

Entity Type _____

If LLC, have you filed a Form 8832? _____

*If so, please provide a copy of the form.

*If S-Corp, please provide copy of Form 2553 and S-Election acceptance letter.

Date business started: _____

Do you have an EIN? _____

If so, what is it? _____

Are your income tax return filings up to date? _____

If not, what was the last year filed? _____

*Please provide a copy of the last income tax return filed.

Has your previous accountant provided tax planning services for you? _____

Are you interested in tax planning services to identify potential tax saving strategies? _____

Do you pay payroll? _____

Do you process your own payroll or outsource? _____

If you outsource, who do you use? _____

If you process your own payroll:

Are you enrolled in IRS EFTPS? _____

Are you enrolled in FDOR Online File & Pay? _____

Are your filings up to date? _____

Are your payroll tax deposits up to date? _____

Do you pay Sales Taxes? _____

If so, do you pay monthly or quarterly? _____

Are you enrolled in FDOR Online File & Pay? _____

Are your sales tax returns up to date? _____

Do you use a software program for accounting? _____

If so, what program? _____

Will you want your file to reflect changes made by the Accountant? _____

Will you enter the changes yourself, or would you prefer CBA to enter them? _____

If not, Do you use a check register? _____

Would you prefer Monthly or Quarterly services? _____

Are you interested in pick-up / delivery services? _____

Do you use your personal vehicle for your business? _____

If so, are you tracking your mileage? _____

Do you understand your financial statements or would you like to learn more about what they tell you and how to use them to manage your business? _____

Are you interested in Custom Management Reports designed to analyze your financial statements and other data (if necessary) to put the key information you desire to manage your business at your fingertips? _____