

Client Data Form

Business Taxpayer Information

Please provide the following information so that I may setup your client profile:

Business Information:

1. Business Name
2. Business Address
3. Business Phone Number
4. Business Email Address
5. Business Type Sole Proprietor Partnership S-Corporation C-Corporation LLC (Single Member) LLC (Multi Member)
6. Federal ID Number (FEIN)
7. Business Formation Date
8. State of Business Formation
9. Business Description
10. Number of Owners
 - a. If more than one owner, please provide the Name and Social Security number of each individual.

Additional Owners:

Name
Social Security Number
Name
Social Security Number



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To protect your personal information, please do not send this via email!

To securely submit this form, an *Intuit Link* account has been set up for you.

To login, go to your email and follow the instructions provided by Intuit.

First time users will need to create a Username and Password.

Once logged in, upload documents and IDs using the Add Document icon.