



Rutherford, Taylor & Company, P.C.

Certified Public Accountants • Greenville, Texas • Established 1980

New Business Client Information

ENTITY

Entity name EIN

DBA (if applicable)

Entity classification (check one)

☐ Corporation (1120)

☐ S-Corporation (1120-S)

☐ Partnership (1065)

☐ Non-Profit (990)

☐ Single Member LLC (1040)

☐ Sole Proprietor (1040)

ENTITY CONTACT INFORMATION

Street address

Suite number

City / State / Zip

Entity phone Entity fax

Contact name Cell phone

Email

QUESTIONNAIRE

Has the entity filed a federal tax return previously? ☐ Yes ☐ No

If yes, please provide a copy of the prior filing.

If not, is this a newly established entity? ☐ Yes ☐ No

If yes, please provide copies of the formation documents.

Does (or will) the entity have payroll (W-2 employees)? ☐ Yes ☐ No

Does (or will) the entity file 1099s (NEC, MISC, etc.)? ☐ Yes ☐ No

Does (or will) the entity file sales tax reports? ☐ Yes ☐ No

ADDITIONAL SERVICES REQUESTED

For example: bookkeeping, payroll, sales tax filings.

FOR OFFICE USE ONLY

Client ID # Responsible professional Date received