



### **My Business Partners Appointment – (Business Set Up Appointment)**

- Company name
- Company address
- Company contact
- Company phone number
- Company web address
- Prior 2 years tax returns, if not completed by our firm
- Type of services interested in: Payroll, accounting, tax planning, tax return preparation, sales tax preparation, financial statement preparation
- Bank statement and register (QuickBooks file, if used)
- Documentation to support assets and liabilities
- Federal ID# - copy of IRS letter
- Type of entity (Partnership, LLC, Corporation, S Corp)
- Copy of initial entity creation paperwork- SS-4, Articles of Organization
- State tax # (withholding, TPT, and DES)