



NEW/UPDATE BUSINESS INFORMATION

PLEASE PRINT CLEARLY

Date: \_\_\_\_\_ Tax Preparer: \_\_\_\_\_

Type of Business:      LLC \_\_\_\_\_      C-Corp \_\_\_\_\_      S-Corp \_\_\_\_\_

Name of Company: \_\_\_\_\_

Company Address: \_\_\_\_\_

\_\_\_\_\_

Primary Contact: \_\_\_\_\_

Primary Telephone: ( \_\_\_\_\_ ) \_\_\_\_\_

Email Address: \_\_\_\_\_

**Miscellaneous Information:**

Does the entity provide a service or product? \_\_\_\_\_

What is the type of Business Activity? \_\_\_\_\_

*(Please be specific with the following referral information. Thank you!)*

Referred by: \_\_\_\_\_ Relationship/Source: \_\_\_\_\_

Amount Quoted: \$ \_\_\_\_\_