GRACE WILLIAMS
Certified Public Accountants & Consultants

Client Data Sheet

Step 1: First Contact

Client Data

Business Name		Date Established	
Contact Person		Referred by	
Owner / President		City	
Business Address		Zip	
State		Email	
Business Phone		Position	
Contact Person Mobile			

Principal

Name____________________ SSN________________ Position________________

Address____________________________________

Name____________________ SSN________________ Position________________

Other Person____________________________________

Name____________________ SSN________________ Position________________

Other Person____________________________________

Business Structure

☐ LLC-Sole Prop ☐ Partnership ☐ S-Corp ☐ Corporation ☐ Schedule C

Business Structure

CorporateTaxes From		CorporadeTaxes to	
Payroll W2		1099's	
Property Taxes		Sales Taxes	
Business Type			

Step 2: Second Contact

Nature of Business		EIN Number	
Disposition of Income		Date Established	
Payroll		Fiscal Year-Date	
Provider		No. of Employees	
Bank Name		Checking Accounts	
Routing Number		Account Number	
Avg # Transactions		Routing Number	
Previous Accountant		Bank Online User	
		Bank route Password	

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Records Needed

☐ Signed Engagement Letter	☐ Online Access to Bank Accound	☐ Bank Statements W check images
☐ Last Balance Sheet or QB Back up	☐ Last Tax Return- Corp Personal	☐ Payroll Data
☐ Current Sales Records	☐ Corporate EIW letter	☐ Articles of Incorporation
☐ 1099 Forms	Others	

Services

Membership	Taxes Previous Year	TY / TYRS	ISR Representation	TY / TYRS
☐ Bronze	☐ Corporade Income Taxes		☐ IRS Representation	
☐ Silver	☐ Amended Corporate Taxes		☐ Offer in Compromise	
☐ Gold	☐ Personal Taxes		☐ POA Form 2848	
☐ Platinum	☐ Amended Personal Taxes		☐ Personal Business	
	☐ 2553			

Extra Services	Incorporation	Other services		Sofware
☐ Sales Tax	☐ Business Incorporation	☐ Consulting Services	☐ SBA Loan	☐ QB Online
☐ WC Audit / Liability / Audit	☐ Business License Apliccation	☐ Financing Letter / Comfort Letter	☐ Other Loon	☐ QB Desktop
	☐ Business License Renewal	☐ Tax Planning	☐ Copies Taxes	☐ Other
	☐ 2553 Change to Scorp	☐ Tax ID	☐ Amended Personal Taxes	
			☐ Payroll	

Membership Fee

Membership Monthly Fee		Installation Fee*	
Year End Fee		Back-Work Fee**	
Back-work will Include		Fee is Effective	
Special Fee		Type	
Discount		Total Transactions	

*Installation fee is payable whit order

**Back-work fee is payable 1/2 whith order -- Balance on completion

Note: it is understood that no information obtained either verbally or Through records shall be disclosed by any member of Grace Williams, CPA and will be help in strictest confidence