



Main: 623.240.9545 | Toll-Free Fax: 866.779.5210 | Email: info@jeffersonfranklintax.com

BUSINESS INFORMATION SHEET

DATE _____ APPOINTMENT TIME _____ ASSOCIATE _____ NEW CLIENT Y / N

HOW DID YOU HEAR ABOUT US? _____

BUSINESS INFORMATION	
ORGANIZATION NAME:	
EMPLOYER ID #:	
FOUNDATION DATE:	
SERVICE/PRODUCT:	
PHONE NUMBER:	

BUSINESS ADDRESS INFORMATION			
ADDRESS:			UNIT #:
CITY:	STATE:	ZIP CODE:	

PERSONAL CONTACT INFORMATION	ORG. TYPE: CHECK ALL THAT APPLY
FIRST NAME:	<input type="radio"/> SOLE PROPRIETORSHIP <input type="radio"/> PARTNERSHIP- OWNERSHIP %: <input type="radio"/> NON-PROFIT
LAST NAME:	
HOME ADDRESS #:	
PHONE NUMBER:	<input type="radio"/> S-CORP <input type="radio"/> C-CORP <input type="radio"/> LLC
E-MAIL ADDRESS:	

PARTNER INFORMATION					
FIRST NAME:	FIRST NAME:	FIRST NAME:			
LAST NAME:	LAST NAME:	LAST NAME:			
CONTACT #	CONTACT #	CONTACT #			
SOCIAL SECURITY #:	SOCIAL SECURITY #:	SOCIAL SECURITY #:			
OWNERSHIP %:	OWNERSHIP %:	OWNERSHIP %:			
ADDRESS:	ADDRESS:	ADDRESS:			

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REPRESENTATIVE SIGNATURE

DATE

Your Taxes = Planned. Prepared. Solved!
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 www.jeffersonfranklintax.com