

2022 Business Client Intake

Date \_\_\_\_\_

- Bob
- Jason
- Joshua



ALL MATTERS OF ACCOUNTING AND TAXATION

**New Client**- *In order to protect your information please return this completed form to a member of the MA Team, upload it to SmartVault, our secure online client portal, or mail to: Management Accounting, 18 Middle St Brunswick, ME 04011*

- *We require a copy of your EIN Letter and Articles incorporation to prepare your tax returns.*

**Returning Client** - *completed form can be returned to a member of the MA Team, uploaded to our secure online client portal, emailed to [office@mainebcaccounters.com](mailto:office@mainebcaccounters.com) or mailed to the address listed above.*

**Legal Business Name:** \_\_\_\_\_ **Employer ID:** \_\_\_\_\_

**DBA (if applicable):** \_\_\_\_\_ **Business Phone:** \_\_\_\_\_

**# of years in business:** \_\_\_\_\_ **What is the nature of this business?** \_\_\_\_\_

**Business Address:** \_\_\_\_\_ **City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Primary Contact:** \_\_\_\_\_ **Title:** \_\_\_\_\_

**Primary Contact Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Ownership Info:** We need the following information for each partner. **Number of Owners:** \_\_\_\_\_

**Name:** \_\_\_\_\_ **Title:** \_\_\_\_\_ **Ownership %:** \_\_\_\_\_

**Social Security #:** \_\_\_\_\_ **Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Address:** \_\_\_\_\_ **City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Name:** \_\_\_\_\_ **Title:** \_\_\_\_\_ **Ownership %:** \_\_\_\_\_

**Social Security #:** \_\_\_\_\_ **Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Address:** \_\_\_\_\_ **City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Number of W2 Employees:** \_\_\_\_\_ **Who is your payroll company?** \_\_\_\_\_

**What is your filing status?**

- 1120S (S Corp)
- 1120 (C Corp)
- 1120H (HOA)
- 1065 (LLC/Partnership)
- 990 (Non-profit)
- 1040 (Schedule C)
- Not Sure

**Which state returns are you required to file in addition to your federal return:** \_\_\_\_\_

\_\_\_\_\_

**Are you required to send 1099's?**  No  Yes

**Have you sent 1099's for the 2022 tax year?**  No  Yes

**Would you like Management Accounting to send 1099's for you?**  No  Yes

**Does your business work with a bookkeeper?**  No  Yes

Name of bookkeeper: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Does your business use bookkeeping software?**

No  Yes, Desktop or online version? \_\_\_\_\_

Name of software: \_\_\_\_\_

**Have your books been reconciled for 2022?**  No  Yes

**\*IMPORTANT\***

**If the business purchased or sold any fixed assets, made any distributions or draws be sure to provide us with the dates and details of these transactions.**

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

By signing, client indicates that all information provided is accurate and has agreed to Management Accounting's Engagement Policies.  
 \*Engagement Letter is available on the SmartVault client portal or can be provided upon request.