Management Accounting
REDUCING TAXES. INCREASING WEALTH.

2025 Business Intake Form-- Missing information can delay processing.

Legal Business Name: _____Employer ID Number:_____

DBA (if Applicable):_____ Business Phone:_____

-What year was your business established?_____

-Have you provided us with EIN Letter, Articles of Incorporation, and up to date Operating Agreements? ☐ No ☐ Yes

** If you haven't provided these, please upload them to your SmartVault Client Portal.*

-What is the nature of your business? _____

Business Address: _____City:_____ State:____Zip:_____

Primary Contact: _____ Title: _____

Primary Contact Phone: _____

Primary Contact Email: _____

Business Filing Status in 2024 ☐ 1120S (S-Corp) ☐ 1120 (C-Corp) ☐ 1120H (HOA) ☐ 1065 (Partnership)

☐990 (Non-Profit) ☐ 1040 (Schedule C) ☐ Not Sure

-Which State returns are you required to file in addition to your Federal Return? _____

Ownership Information- Have there been any changes in Ownership in 2025? ☐ No ☐ Yes

*If you answered Yes, or if this will be the first year that Management Accounting is preparing a return for this entity, please complete the ownership information below. *It is important that we have correct addresses for each owner.

Name of Owner: _____Ownership Percentage: _____

Email: _____Phone: _____

Address: _____

City: _____State:_____Zip:_____

SSN: _____ (only needed if we this is a new owner or a new return in 2024)

Name of Owner: _____Ownership Percentage: _____

Email: _____Phone: _____

Address: _____

City: _____State:_____Zip:_____

SSN: _____ (only needed if we this is a new owner or a new return in 2024)

Please use Page 3 to report information for additional owners

Employees/Payroll-*Please provide information for employees that receive W2 income from this business.*

Name of Payroll Company? _____

Total number of W2 employees on payroll? _____

Please list the owners that are on payroll? _____

1099s ***Any time a company hires an independent contractor, it is required to issue a 1099 form to the worker; this only applies if the contractor earns more than $600 from the company. We recommend having all independent contractors complete a W-9 before issuing payment. The filing deadline for 1099s is 1/31/2026.***

-Are you required to send 1099s? ☐ No ☐ Yes

-Have you sent 1099s for the 2025 tax year? ☐ No ☐ Yes

-Would you like Management Accounting to prepare and sending your 1099s @$35 per 1099? ☐ No ☐ Yes
Yes*
*If you would like us to prepare your 1099s, please provide a completed 1099 request form by 1/20/26.

Bookkeeping/Financials-*A balance sheet and income & expenses are required to prepare your tax return*

-Does your business use a bookkeeper? ☐ No ☐ Yes Name of Bookkeeper: _____

Bookkeeper's phone: _____

Bookkeeper's email: _____

-Do you use bookkeeping software? ☐ No ☐ Yes Name of software: _____☐ Online ☐ Desktop

-Are your books reconciled for 2025? ☐ No ☐ Yes

*If you answered No, you will need to inform the office once the reconciliation is completed for 2025

-If you do not use Quickbooks Online, we will request that use our Schedule C Template for reporting your business Income and Expenses or our Schedule E Template for reporting your rental property Income and Expenses. Those can be found on our website, in Smartvault or you can request then from office@mainebeancounters.com.

-Has this company purchased or sold any fixed assets, properties or made any distributions or draws? ☐ No ☐ Yes*

*If Yes, please be sure to include those details with the documentation you provide for your tax preparation.

~~-What will be your total SEP IRA Contribution for 2025? _____~~

NOTES:

Signature:_____Date:_____

By signing as a representative of the business you attest that all information provided is correct and up to date. You also agree to submit all your 2024 tax documents for this business tax filing by 2/1/2026 in order for Management Accounting to file your return on or before the 3/16/26 filing deadline. You understand that providing documentation after 2/1/26 may result in the need to file an extension for this tax return.

Name of Owner: _____Ownership Percentage: _____

Email: _____Phone: _____

Address: _____

City: _____State:_____Zip:_____

SSN: _____ (only needed if we this is a new owner or a new return in 2025)

Name of Owner: _____Ownership Percentage: _____

Name of Owner: _____Ownership Percentage: _____

Email: _____Phone: _____

Address: _____

City: _____State:_____Zip:_____

SSN: _____ (only needed if we this is a new owner or a new return in 2025)

Name of Owner: _____Ownership Percentage: _____

Email: _____Phone: _____

Address: _____

City: _____State:_____Zip:_____

SSN: _____ (only needed if we this is a new owner or a new return in 2025)

Name of Owner: _____Ownership Percentage: _____

Email: _____Phone: _____

Address: _____

City: _____State:_____Zip:_____

SSN: _____ (only needed if we this is a new owner or a new return in 2025)