**\*\*Required fields are BOLD\*\***

For best use of integration, client IDs must be consistent within the CS Professional Suite of Software.

EIN/SSNs are used for data sharing. It is recommended to always include these in client setup.

|  |  |  |
| --- | --- | --- |
| Date: | **Staff Completing Form:** | **Client #:** |
| **Entity Name:** | **Description:** |
| **Business Address:**  |
| **City:** | **State:** | **Zip:** |
| **EIN:** | **Year‐end (month):** | **Business phone #:** |
| Fax #: | Website Address: |
| **Taxpayer Name**: | **Taxpayer SSN:** |
| **Spouse Name:** | **Spouse SSN:** |
|  **TP/SP Address:**  |
| **TP/SP City:** | **TP/SP State:** | **TP/SP Zip:** |
| **TP/SP Home phone #:** | TP/SP Work phone #: |  |
| Taxpayer cell #: | **Taxpayer DOB:** | **Taxpayer e‐mail address:** |
| Spouse cell #: | **Spouse DOB:** | **Spouse e‐mail address:** |
| **Entity Primary Contact Name:** | Title: |
|  **Address:**  |
| **Contact phone #:** | **Cell phone#:** | **E‐Mail address:** |
| Billing or Additional Contact Name: (circle one) | Title: |
|  Address:  |
| Contact phone #: | Cell phone#: | E‐Mail address: |
| Preferred or Additional Contact Name: (circle one) | Title: |
|  Address:  |
| Contact phone #: | Cell phone#: | E‐Mail address: |
|  Attorney: | Other Advisor: |
|  Address: | Address: |
| Contact phone #: | Cell phone#: | E‐Mail address: |

**Entity Type (check all that apply)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  **Individual** |  **Individual w/Sch C** |  **Individual w/Sch E** |  **Individual w/Sch F** |  **Trust** |
|  **C-Corp** |  **S-Corp** |  **Partnership** |  **Estate** |  **Non-profit** |
|  |  |  |  |  |

|  |  |  |
| --- | --- | --- |
| **Client Partner:** | **Client Manager:** | **Client Associate:** |

**Staffing**

 **Projects to Add (check all that apply)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **TAX** |  **AUDIT/REVIEW/COMP** |  **ACCOUNTING** |  **PAYROLL** |  **ADVISORY** |
|  1040  1120 1120S 1065 1041 990  706\* 709 Amended Return  Year End Projections Tax Meeting Personal Property Tax Annual Tax Planning  Quarterly Estimates Annual Reports Tax Notice 1040 w/Schedule C/E/F \*provide date of death |  Compiled F/S Monthly Quarterly Annually  Reviewed F/S Monthly Quarterly Annually Audit NFP For Profit EBP  |  Accounting Monthly Quarterly Annually Sales/Use Tax Monthly Quarterly Annually Accounting Review Quarterly    |  Payroll Processing Weekly Bi-weekly Semi-monthly Monthly Quarterly Annual Payroll Compliance W2s 941 940 1099 | Base Level Advisory Package (All New 1040 with Schedule C/E/F Clients) Base Level Advisory Package (All New Business Clients)Accounting System ConfigurationsBusiness Operations and DocumentationBusiness Start-UpBuy-Build-Lease AnalysisCash Flow Planning Using Your Corporation-LLCCompany Fringe BenefitsCorporation-LLC Income Strategies Education Savings and Income Shifting Strategies Entity Structure PlanningEquity Planning-Post Tax Net WorthEstate PlanningIndependent Contractor -Employee AnalysisRental Property OperationsSelling a BusinessSocial Security PlanningSuccession PlanningTax Planning |

**Notes/Client Story**

|  |
| --- |
|  |

**Custom Fields**

|  |  |
| --- | --- |
| Billing Means | ACH/Invoice Emailed/Invoice Mailed/Invoice to Portal |
| Service Needs Tracking | ADVISORY - Needs advisoryADVYMAINT - Needs advisory and maintenance packageALREADYMET - Needs already metBILLCHANGE - Needs billing changed to monthly fixed amountCHANGEORDER - Needs Change OrderDEPART - Needs to depart firmGOALS - Needs discussion on goalsMINIMUM - Needs minimum maintenance packageOPTIMAL - Needs optimal maintenance package |
| QuickBooks User Name/Password |  |
| EFTPS User Name/Password/PIN |  |
| Who is doing payroll | Our staff/myPay-Thomson Reuters/Client self-prepared/ADP/Intuit/Paychex |