**\*\*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 Configurations  Business Operations and Documentation  Business Start-Up  Buy-Build-Lease Analysis  Cash Flow Planning Using Your Corporation-LLC  Company Fringe Benefits  Corporation-LLC Income Strategies  Education Savings and Income Shifting Strategies  Entity Structure Planning  Equity Planning-Post Tax Net Worth  Estate Planning  Independent Contractor -Employee Analysis  Rental Property Operations  Selling a Business  Social Security Planning  Succession Planning  Tax Planning |

**Notes/Client Story**

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| --- |
|  |

**Custom Fields**

|  |  |
| --- | --- |
| Billing Means | ACH/Invoice Emailed/Invoice Mailed/Invoice to Portal |
| Service Needs Tracking | ADVISORY - Needs advisory  ADVYMAINT - Needs advisory and maintenance package  ALREADYMET - Needs already met  BILLCHANGE - Needs billing changed to monthly fixed amount  CHANGEORDER - Needs Change Order  DEPART - Needs to depart firm  GOALS - Needs discussion on goals  MINIMUM - Needs minimum maintenance package  OPTIMAL - 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 |