

The Self-Employed Tax Company

"Helping You Become Successfully Self-Employed"

Business Information (SMLLC)

Tell us all about your business 😊

General Business Information

Business Name: _____

Address: _____

City: _____

State: _____ Zip: _____

E.I.N #: _____

Date of Formation: _____

State of Formation: _____

Primary Business Activity: _____

(Example: wholesale sale of hardware to retailers)

General Questions

Is this the First return? _____ Is this the Final return? _____ Name Change? _____ New Address? _____

Which Accounting Method is used? _____

Is there a Separate Bank Account? _____

Did you use a bookkeeper or bookkeeping software? _____

Responsible Party Information

Because a Single Member LLC (SMLLC) has only one owner. The responsible party is the individual who created the LLC. And because a SMLLC is a disregarded entity for Federal Tax purposes, the tax form is going to be included on the Personal Return of the owner of the LLC. Therefore, please fill out page 2 for the responsible party.

**** We also request that you bring a copy of your last year's tax return if you are just starting with us. ****

We look forward to serving you!

The Self-Employed Tax Company

"Helping You Become Successfully Self-Employed"

Client Information

Tell us all about you ☺

Personal Information

Primary Tax Payer (you)

Spouse

Name: _____
First , Last

Name: _____
First , Last

Date of Birth: _____

Date of Birth: _____

Social Security # _____

Social Security # _____

Address: _____

City: _____

State: _____ Zip: _____

Occupation: _____

Occupation: _____

Contact # _____

Contact # _____

Email: _____

Email: _____

Dependent Information (list everyone you cared for including friends)

Name (First, Last)	Relationship	Date of Birth	Social Security #	Disabled?	Full Time Student?

Bank's Direct Deposit Information (In Case of Refunds Only)

Bank Name: _____

Routing Number: _____

Account Number: _____

** We also request that you bring a copy of your last year's tax return if you are just starting with us. **

We look forward to serving you!