



New Client Information Sheet

For Businesses, Estate & Trust

Entity Type	<input type="checkbox"/> 1120S - S Corp	<input type="checkbox"/> 1120C - C Corp	<input type="checkbox"/> 1065 - Partnership	<input type="checkbox"/> 1120H - Homeowners Assoc.	<input type="checkbox"/> 1120SF - Settlement Fund
	<input type="checkbox"/> 990 - NFP	<input type="checkbox"/> 1041 Fiduciary	Other:		YE Month
Business Name		DBA Name		Business EIN	
Business Address		City	State	Zip Code + 4 digit	County
Mailing Address (if different)		City	State	Zip Code + 4 digit	County
Business Phone		Business Fax		Business Website	
Primary Contact Name / Title				Primary Contact Home Phone	
Primary Contact Email				Primary Contact Cell Phone	
Preferred Contact Name / Title				Preferred Contact Home Phone	
Preferred Contact Email				Preferred Contact Cell Phone	
Billing Contact Name / Title				Billing Contact Home Phone	
Billing Contact Email				Billing Contact Cell Phone	
1. Stockholder/Beneficiary Name		Stockholder/Beneficiary Address		SS# or EIN	Ownership %
2. Stockholder/Beneficiary Name		Stockholder/Beneficiary Address		SS# or EIN	Ownership %
3. Stockholder/Beneficiary Name		Stockholder/Beneficiary Address		SS# or EIN	Ownership %
3. Stockholder/Beneficiary Name		Stockholder/Beneficiary Address		SS# or EIN	Ownership %
3. Stockholder/Beneficiary Name		Stockholder/Beneficiary Address		SS# or EIN	Ownership %
Attorney			Banker		
Insurance			Previous Accountant		
Describe client's business activity:					

For Businesses, Estate & Trust (Continued)

Have you previously worked with a professional accounting firm? Yes No
If yes, why did you stop working with them?

Why are you currently seeking the services of a professional accounting firm?

What services do we provide that you believe could be beneficial to you?

Have any of your tax circumstances changed over the past three years? Yes No
If yes, how?

Are there challenges that you either currently are or you do anticipate facing in the near future?
If yes, please explain:

Has anyone explained to you how tax brackets work and the difference between your marginal tax rate and effective tax rate? Yes No

Has anyone ever explained the difference between tax free and tax deferred to you? Yes No

Does your current accounting systems provide the information you need to make accurate decisions in a timely manner? Yes No

Do you feel properly educated on benefits available to assist your family and retain quality employees? Yes No

Do you use key performance indicators in your business? Yes No

Would you have interest in knowing what your business is worth and/or how to increase its value? Yes No

How long have you owned the business?
Do you have a projection of how much longer you intend to do so?

Has the company sued the prior accountants or other professionals? Yes No

Are services and/or reports intended to satisfy regulatory requirements or third parties? Yes No
If so, for whom?

Client Communications

Preferred Contact Method: Call Text Email

Referred by / How did you hear about us? (Please include name)

Do you want to have a Web Portal account set up on our Siepert website? Yes No If yes, email address: _____

How do you want to receive invoices and statements? Paper Email Email address: _____ Web Portal

For Processor Use

Would service to this company cause independence problems or conflicts of interest?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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If yes, why?