BOHMAN C.P.A. GROUP, LLC
1140 N Lincoln Street, Greensburg, IN 47240
Phone (812) 222-3035   Fax (812) 222-3037
www.bohmancpagroup.com

New Business Client Information Request

Business Name: ______________________________

Business Address: ______________________________

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Phone Number: ____________________ Fax: ____________________

Email: ______________________________

Primary Business Activity: ______________________________

Entity Type ☐ LLC ☐ Sole-Proprietor ☐ Corp ☐ S-Corp ☐ Partnership ☐ Not-For Profit ☐ Estate ☐ Trust

Federal ID: ____________________ State ID: ____________________

Year-End Date: ____________________ Date Incorporated: ____________________

Officer (Board of Directors if non-profit) Information

Officer Name *Title* *Contact Telephone* *E-mail*

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________

Professional Advisors

Please list contact information for your below listed advisors (Name, Firm, Telephone)

Attorney: ______________________________

Insurance: ______________________________

Pension/Retirement: ______________________________

Banker: ______________________________

Current Accountant: ______________________________

Accounting Department

Who is the primary contact for accounting information? ____

Phone: __________________________________ Email: ____

Preferred method of contact: ____

What type of accounting software do you use (version, year) ____

Do you produce monthly/quarterly financial statements? ____

Please provide a brief overview of your business goals: ____

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Expectations of your CPA

Why are you seeking a new CPA?

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How were you referred to Bohman CPA Group? ____

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How frequently would you like to be in contact with your CPA? ______________________________________

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What are your expectations from your CPA?

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Please mark all the primary services you would like Bohman CPA Group to perform:

- ☐ Individual Tax
- ☐ Payroll
- ☐ Tax Planning
- ☐ Business Tax
- ☐ Quarterly Financial Statements
- ☐ Business Entity Choice
- ☐ Bookkeeping
- ☐ Year-End Financial Statements
- ☐ QuickBooks Training
- ☐ Other:

What to Bring

There are some documents you will want to collect, prior to your appointment, so that we can best serve you. Please take a moment to review the items listed and provide as many documents as available.

Business Client Documents

Please bring the below documents with you to your appointment:

- Client intake form
- Copies of past 3 years federal and state income tax returns
- Prior year federal and state depreciation schedules
- Prior year Forms W-3, W-2s, 1099s
- Prior year Personal Property tax return
- Prior year financial statement
- Articles of Incorporation
- Income and expenses to date if scheduled for tax planning appointment
- Copies of any notices received from the Internal Revenue Service or other taxing agencies

Not-For-Profit Documents

Please bring the below documents with you to your appointment:

- Client intake form
- Copies of past 3 years federal and state income tax returns
- Prior year reviewed or audited financial statements
- Articles of Organization

For Internal Use:

CPA: ________________________________

Meeting Date: ________________________________

Signed Letter of Engagement: ______________________