

PATRICK L. MURRAY, P.C.
NEW CLIENT PROFILE

Company Name _____

Date _____

Contact Person _____

Other Contact Name _____

Title _____

Title _____

Mailing Address _____

Phone # (office) _____

Phone # (home) _____

E-mail Address _____

Fax # _____

Business Entity Type _____

Principal Business Activity _____

EIN# _____

How did you hear of our firm?

- Referred by _____
- Yellow pages _____
- Received letter from our firm _____
- Other _____

Other services you may be interested in:

- Investment counseling
- Business accounting or start up consulting
- Estate planning/Estate Tax Return
- Retirement planning
- Individual tax planning
- Corporate accounting / tax work
- Other _____

Additional questions or comments?

INFORMATION NEEDED FOR CORPORATE/PARTNERSHIP
TAX RETURNS

- 1) Prior year tax return(s) filed including depreciation schedules
- 2) Financial Statements provided to you by your prior accountant for prior or current years.
- 3) Any correspondence received from the Internal Revenue Service or state taxing authorities
- 4) Corporate/partnership documents which provide information related to partners or shareholders percentages or identification numbers
- 5) Accounting records for tax year (If your accounting records are located in QuickBooks, please provide a back-up disk of the data after the December bank statement(s) have been reconciled. Please provide the user name and password for the administrator.)
- 6) Bank statements for all business bank accounts showing balance as of last month in fiscal year
- 7) Payroll reports filed for the tax year (if applicable)
- 8) State Sales tax reports filed (if applicable)
- 9) List of new assets purchased during tax year including date placed in service, cost and description of asset (if applicable)
- 10) Loan balances/interest paid statements from financial institutions (if applicable)
- 11) Retirement plan information (if applicable)
- 12) Credit card statements showing balances due as of year end (if applicable)
- 13) Closing or settlement statements or similar documents for sales or purchases of major business assets, such as automobiles, goodwill, real property