



Business Type (Choose One) : LLC / S Corporation / C Corporation / Partnership / Other

If an S Corp, S Corp election date with IRS:

and election date with N.Y. State:

Business Name:

D/B/A (if applicable) :

Phone #:

Address:

Date Business Started:

E-mail:

Employer ID # [EIN :]

What is the Principal Business Activity?

| Name of Member/Partner/Owner | Ownership % & Amount of Contributions/Withdrawals | Address | SS, EIN or ITIN # |
|------------------------------|---|---------|-------------------|
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PLEASE PROVIDE US WITH THE PHONE # & E-MAIL ADDRESS OF AT LEAST ONE MEMBER, and also a copy of last year's tax returns.

Please provide your business bank account information:

Bank Routing # _____ Bank Name _____
Bank Account # _____

At the End of the year did the business own directly 20% or own directly or indirectly 50% or more of the voting power of any foreign or domestic corporation ?

| | |
|-----|----|
| YES | NO |
| | |

At the End of the year did the business own directly 20% or more or own directly or indirectly 50% or more in the profit, loss, or capital in any foreign or domestic business, LLC or in the beneficial interest of a trust?

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During the tax year did the business have any debt that was cancelled or reduced?

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Does the business have any foreign bank accounts ?

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Did the business received any property in a like kind exchange ?

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Did the business make any payments that would require the issuance of 1099 forms ?

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If yes, did the business issue all required 1099 forms ?

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During the year did the corporation have significant change in ownership?

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What was the value of your assets & liabilities at the end of the year including all business bank accounts ?

| Asset / Liability : | Value / Balance : |
|---------------------|-------------------|
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