



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:

IF YOU ARE FILING FOR THE FIRST TIME, PLEASE SHOW US PROOF THAT YOU HAVE BEEN APPROVED AS AN S-CORP

Business Name:

D/B/A (if applicable) :

Address:

Date Business Started:

Employer ID # [EIN :]

What is the Principal Business Activity?

Phone #:

E-mail:

PLEASE PROVIDE US WITH THE PHONE # & E-MAIL ADDRESS OF AT LEAST ONE MEMBER, and also a copy of last year's tax returns.

Name of Member/Partner/Owner	Ownership % & Amount of Contributions/Withdrawals	Address	SS, EIN or ITIN #

Please provide your business bank account information:

Bank Routing # _____ Bank Name: _____
 Bank Account # _____

	YES	NO
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?	<input type="checkbox"/>	<input type="checkbox"/>
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?	<input type="checkbox"/>	<input type="checkbox"/>
During the tax year did the business have any debt that was cancelled or reduced?	<input type="checkbox"/>	<input type="checkbox"/>
Does the business have any foreign bank accounts ?	<input type="checkbox"/>	<input type="checkbox"/>
Did the business received any property in a like kind exchange ?	<input type="checkbox"/>	<input type="checkbox"/>
Did the business make any payments that would require the issuance of 1099 forms ?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, did the business issue all required 1099 forms ?	<input type="checkbox"/>	<input type="checkbox"/>
During the year did the corporation have significant change in ownership?	<input type="checkbox"/>	<input type="checkbox"/>

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

Asset / Liability :	Value / Balance :

