

Business Tax or Accounting Services
NEW OR UPDATED BUSINESS INFORMATION FORM

Instructions:

Print this form and answer as many questions as possible for your business engagement.
You can fax the completed form to (302) 378-1452 or e-mail to orders@rgabase.com.

If you need assistance or have any questions, please call (302) 378-3734 or send an e-mail to orders@rgabase.com.

(i) Business Name: _____

Main business address (address where business is conducted from):

(i) _____

Business activity (what do you do?): _____

In what State is your main business operations?: _____

How many physical business locations do you have?: _____

Do you have a current business license or registration? _____

Did you solicit or conduct business within any other State?: _____

Address of all physical locations:

i _____
ii _____
iii _____

In what State is your main business operations?: _____

Do you sell by mail order or over the internet?: _____

Do you collect sales tax? _____

Are you required to collect sales tax? _____

(a) Did you keep accurate bookkeeping entries and records for the period or year? _____

(b) If yes please provide your bookkeeping information including income and expenditure totals... then skip to (i)

(c) If no, go to questions (d through u)

(d) Copies or original bank statements with canceled checks for the period or year

(e) Copies or original credit card statements used for business during the period or year

(f) Copies or original of all receipt for business expenses (e.g. gas, supplies, etc.)

(g) Copies or originals of sales invoices, sales tickets or a sales record for the period or year

(h) If you do not have (g), provide an estimate or record of your total sales for the period or year

(i) Bring or submit every IRS or State tax notices received during the year

(j) Names, address, and USA Social sec. or Tax id# of owner, stockholders, partners and ownership %.

Name	Address	Social Security or Tax ID No	% ownership
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

(k) Entity type (Corporation, LLC, LLP, Sole Proprietorship, General Partnership): _____

(l) If LLC, did you make an IRS election to be taxed as a corporation?: _____

(m) If Corporation, did you make an IRS election to be taxed as an S-Corporation?: _____

(n) Copies or original of previous year and quarterly tax returns already filed with IRS and State

(o) Did you pay wages or salaries to employees during the period or year?: _____

(p) If yes, did you file federal 940, 941 & State payroll tax returns ? : _____

(q) If no to question (p), would you like us to prepare the payroll tax returns ? : _____

(r) Did you prepare any 1099-Misc for the tax year?: _____

(s) Would you like us to prepare your 1099-Misc forms?: _____

(t) Did you purchase or sell a business during the tax year?: _____

(u) Do you have workman's compensation insurance for your employees?: _____

Please list any other information you would like us to know about your business:

Tax or accounting period refers to monthly, quarterly or semi-annual periods.

Year or yearly refers to the calendar or fiscal year period.

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Middletown, Delaware USA
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