

ANNUAL UPDATE BUSINESS TAX CLIENT INFORMATION SHEET

ANY UPDATES TO YOUR TAX RETURN? *if yes, please fill out new info where appropriate

Date _____
 Client/ Business Name _____
 EIN Number _____
 Tax Year _____

Did you provide a QB file? _____ If YES; what version of QB? _____

Password? _____

** If you have QuickBooks Online, access should be granted to Jhaugen@cfocolorado.biz

Did you run payroll for yourself or employees?

Has your payroll service provider changed? _____ If yes, please provide: _____

Business Name Change _____

Business Address Change _____

State of Source Income Change _____

Contact Info Change Name _____

New Work Phone _____ New Work Cell _____

New Email Address _____

Ownership Change / Update

Owner #1 _____

% Change _____

Address Change _____

Cell Phone _____ Email Address _____

Owner #2 _____

% Change _____

Address Change _____

Cell Phone _____ Email Address _____

Owner #3 _____

% Change _____

Address Change _____

Cell Phone _____ Email Address _____

Purchase of New Assets?

Briefly Describe _____

Disposition Of Assets?

Briefly Describe _____

Are You Using a Mileage Log For All Business Vehicles? *if YES, please provide

Note: All tax returns will be electronically filed UNLESS manual filing is requested

Note: Completed client copy will be sent via secure email

Note: Completed K-1s will be sent via secure email; distribution of K-1s is the responsibility of the majority owner