

**NEW CLIENT INFORMATION FORM - BUSINESS PROFILE**

How Did You Hear About Us?     Yelp     Life in the Ranch     Internet Search     Referral     Other    Date: \_\_\_\_\_

**COMPANY INFORMATION**

Please Print

Company Name: \_\_\_\_\_ E-Mail: \_\_\_\_\_  
 Entity Type: \_\_\_\_\_ Business Phone: \_\_\_\_\_  
 Fiscal Year End: \_\_\_\_\_ Mobile Phone: \_\_\_\_\_  
 EIN: \_\_\_\_\_ Primary Contact: \_\_\_\_\_

Business Start Date: \_\_\_\_\_

Billing Address: \_\_\_\_\_

Physical Address: \_\_\_\_\_

Preferred Method of Correspondence:

Office (In Person): \_\_\_\_\_ Electronic \* \_\_\_\_\_ Mail \_\_\_\_\_

I am interested in the following services:

Bookkeeping \_\_\_\_\_ Payroll \_\_\_\_\_ Tax Prep \_\_\_\_\_  
 Tax Planning \_\_\_\_\_ Consulting \_\_\_\_\_ Other \_\_\_\_\_

**SHAREHOLDER INFORMATION**

Individual / Entity Name	Address	EIN/SSN	% Ownership	Passive (Y/N)

\* You will receive an e-mail from Scott & Aderholt , PLLC to register for an Onvio account