

storenfinancial new business client information

main business information

date: _____

client ID: _____ federal ID: _____ business industry code: _____

business entity: individual llc s corporation trust other

preparer: _____ ATOM portal password: _____

legal business name: _____ dba: _____

business mailing address _____

city: _____ state: _____ zip: _____

business physical location if different from above: _____

business service/product: _____

phone: _____ fax: _____

primary contact information

primary contact name: _____

address (if different) _____

city: _____ state: _____ zip: _____

ss# or tax id#: _____ % of ownership: _____

title: _____ active: yes no

email: _____ phone: _____

does this business currently have employees? yes no don't know

items we may need: (all may not apply)

- legal documentation of entity including bylaws and articles
- IRS confirmation of tax id
- state withholding tax id
- quarterly payroll records
- prior year depreciation schedules
- income statements
- balance sheets
- Copy of prior tax returns for the past 2 years
- Copy of previous business personal property return filed with the county.

notes: _____

*if there are multiple partners/officers please complete section on page 2

additional partners/officers--please list all

name: _____

address: _____

city: _____ state: _____ zip: _____

ss# or tax id #: _____ % of ownership: _____

title: _____ active? yes no

individual llc s corporation trust other

name: _____

address: _____

city: _____ state: _____ zip: _____

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individual llc s corporation trust other

How to apply for an Indiana Withholding Number:

Go to the following web address: <http://www.in.gov/dor/4337.htm>

Information required for the online BT-1 application:

- Email address.** This is either for the person submitting the application or the address where the application registration information (including the Document Locator Number) should be sent.
- Federal ID Number (FID/EIN).** An FID is needed to complete the application. Businesses needing an FID can get one from the IRS at: <http://www.irs.gov/businesses/small/article/0,,id=98350,00.html>.
Important Note: The only exception to this would be for a Sole Proprietor or a Limited Liability Corporation not registering for Withholding Tax and not planning to get an FID/EIN. In this case, a paper BT-1 should be completed and mailed to the Indiana Department of Revenue.
- Taxpayer Identification Number (TID).** The TID is requested when adding a location to an existing business account or when registering an existing location for other tax types.
- Location Number.** The Location Number is requested when registering an existing business location for other tax types.
- Legal Name, Partnership Name, Corporate Name, Other Entity Name, or Sole Owner Name.**
- Business Contact Name and Daytime Phone Number.**
- Document Locator Number (DLN).** The DLN is displayed at the bottom of the Business Contact Name and Daytime Phone Number screen after starting the online process. It is very important that you write the DLN down for future reference.
- Type of Organization.** Descriptions of the types of organizations are found on the Indiana Secretary of State web site: <http://www.in.gov/ai/appfiles/sos-registration/landing.html#>.
- Indiana Secretary of State Control #.** All businesses except Sole Proprietors and General Partnerships must register with the Indiana Secretary of State. If the business needs to be registered, please do so at: <http://www.in.gov/ai/appfiles/sos-registration/landing.html>.
- State of Incorporation, Date of Incorporation, State of Commercial Domicile, and Date Authorized to Do Business in Indiana if not Incorporated in Indiana.**
This information is required for corporations.
- Primary mailing address for the business.**
- North American Industry Classification System (NAICS) Code.** A list of NAICS codes may be found at: <https://secure.in.gov/apps/dor/btl/naics.html>.
- Responsible Officer Information (including Social Security Number).**
- Business Trade Name or DBA.**
- Business Location Phone Number and Address.**
- Tax Type(s) for which the business is registering.** For more information about business tax types, visit the New and Small Business Education Center: www.smallbiz.in.gov.

How to apply for an Indiana Unemployment Number:

Go to the following web address: <http://uplink.in.gov/ESS/ESSLogon.htm>