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Tax Services Onboarding

HOW-TO INFORMATION FOR BUSINESSES

Thank you for choosing Storen Financial for your tax planning and preparation needs. Our team of seasoned tax professionals will work with you to utilize tax-saving strategies that are tailored to your unique situation.

In order to make your onboarding experience easier, we've compiled everything you need to get started.

DOCUMENTS NEEDED FOR ONBOARDING:

- Storen Financial New Business Client Data Sheet
- Copy of Prior 2 Years Tax Returns
- IRS Confirmation of Tax ID / EIN Letter
- Legal Business Documentation (articles of organization, partnership agreements, governing docs, etc)

DOCUMENTS NEEDED FOR TAX PREPARATION & PLANNING:

- Accurate, reconciled financial reports (Income Statement & Balance Sheet) generated from reputable accounting software.
- All of the information, forms, expense totals, etc. needed to complete a tax return. Use our helpful "Checklist Worksheet" as your guide to collecting these documents.

Helpful Tool!

FORM NEEDED TO COMPLETE A TAX RETURN:

- Storen Financial Engagement Letter

OPTIONS FOR HOW TO SUBMIT DOCUMENTS:

- Upload to your secure Storen Financial Client Portal (Please contact us to request access.)
- Drop off documents at our office in Zionsville
- Place documents in one of our secure lockboxes (Located in Brownsburg or Zionsville. See instructions on our website.)

For data security purposes, please do NOT email personal or financial information.

OTHER QUESTIONS / RESOURCES

For more information, tools, resources and forms visit our website at **www.storenfinancial.com/tax-season** or contact our team at any time.

The Only Financial Resource You Need for Your Business

By working with our team of experienced professionals and QuickBooks Advanced Certified ProAdvisors, we provide financial guidance and offer support throughout the year.

- Bookkeeping & Accounting
- QuickBooks Setup & Training
- Tax & Financial Consulting
- Employer Retirement Plans

Questions?

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New Business Client Data Sheet

Thank you for choosing Storen Financial for your business. Please complete the form below and note that we may need additional information from you (if applicable) such as: 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, or copy of previous business personal property return filed with the county.

MAIN BUSINESS INFORMATION

Legal Business Name:			
DBA:			
Services or Product:			
Business Tax Entity:	☐ Sole Proprietor ☐ Partnership ☐ S Corp ☐ C Corp ☐ Other:		
Phone:		Website:	
Federal ID:		Accounting Software:	
Business Start Date:		Payroll Provider:	

BUSINESS MAILING ADDRESS

Street	City	State	Zip

BUSINESS PHYSICAL LOCATION

Please complete if different from business mailing address.

Street	City	State	Zip

PRIMARY CONTACT INFORMATION

Name:					
Title:					
Phone:		Email:			
SS# or Tax ID#:		% of Ownership:		Active (yes or no):	

Please complete if different from business mailing address.

Street	City	State	Zip

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New Business Client Data Sheet

ADDITIONAL PARTNERS / OFFICERS

Name:					
Phone:		Email:			
SS# or Tax ID#:		% of Ownership:		Active (yes or no):	
Tax Entity:	☐ Individual ☐ Sole Proprietor ☐ Partnership ☐ S Corp ☐ C Corp ☐ Trust				

Street	City	State	Zip

Name:					
Phone:		Email:			
SS# or Tax ID#:		% of Ownership:		Active (yes or no):	
Tax Entity:	☐ Individual ☐ Sole Proprietor ☐ Partnership ☐ S Corp ☐ C Corp ☐ Trust				

Street	City	State	Zip

Name:					
Phone:		Email:			
SS# or Tax ID#:		% of Ownership:		Active (yes or no):	
Tax Entity:	☐ Individual ☐ Sole Proprietor ☐ Partnership ☐ S Corp ☐ C Corp ☐ Trust				

Street	City	State	Zip

