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Business Services

HOW-TO INFORMATION FOR ONBOARDING

By working with our team of experienced professionals, we provide financial guidance and offer you support throughout the year. Our goal is to help you build a strong vibrant business that can continually provide desired results.

A) COMPLETE FORMS

- New Client Data Sheet
- New Business Client Data Sheet

B) COLLECT DOCUMENTS

- 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)

C) SUBMIT FORMS + COLLECTED 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.

ADDITIONAL DOCUMENTS NEEDED FOR TAX PREPARATION

- Engagement Letter & Questionnaire Forms
- 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.

For more tax 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

No matter where you stand in your journey of business ownership, we offer comprehensive services to propel you towards success.

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

Questions?

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Business Services Director,
QuickBooks
Certified ProAdvisor
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Securities offered through Simplicity Investments, Member FINRA/SIPC. Investment advice offered through Storen Legacy Partners, a registered investment advisor. Tax/accounting/CPA related services offered through Storen Tax & Financial Group Inc. DBA Storen Financial. Storen Tax & Financial Group Inc. is a separate legal entity and not affiliated with Simplicity Investments. Simplicity Investments does not offer tax advice or Tax/accounting/CPA related services. Storen Legacy Partners and Storen Financial are separate entities from Simplicity 10082026

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New Client Data Sheet

Thank you for choosing Storen Financial. Please note that this information will be used for all services provided by Storen Financial, so please complete and verify the accuracy of this information.

CLIENT 1

☐ Check Preferred Contact Method (*select one*)

Legal First Name:		Mobile Phone:	☐
Preferred First:		Home Phone:	☐
Middle Initial:		Work Phone:	☐
Legal Last Name:		Home Email:	☐
SSN:		Work Email:	☐
DOB:		Employer:	
Retired?:	☐ Yes ☐ No	Occupation:	

CLIENT 2 *(if applicable, please complete spouse information for a Married Filing Jointly or Married Filing Separate tax return)*

Legal First Name:		Mobile Phone:	☐
Preferred First:		Home Phone:	☐
Middle Initial:		Work Phone:	☐
Legal Last Name:		Home Email:	☐
SSN:		Work Email:	☐
DOB:		Employer:	
Retired?:	☐ Yes ☐ No	Occupation:	

Own a Business?:	☐ Yes ☐ No	Business Name:	

ADDRESS

Street	City	State	Zip

CHILDREN

☐ Check if child qualifies as a dependent.

Dep.	Legal First Name	Legal Last Name	SSN	DOB
☐				
☐				
☐				
☐				
☐				
☐				

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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:			
QBO Account Name:			
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

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