

# NEW CLIENT INFORMATION FORM

Please complete this form and fax to: 1-877-219-0473

OFFICE LOCATION (CIRCLE): SF LA SJ

PRIMARY STAFF: \_\_\_\_\_

MGR/SUPERVISOR: \_\_\_\_\_

CLIENT NAME: \_\_\_\_\_ 4CODE: \_\_\_\_\_

BUSINESS NAME: \_\_\_\_\_ 4CODE: \_\_\_\_\_

SchC/Sole Proprietor  C-Corp  S-Corp  LLC  Partnership  Trust

PARTNERS? \_\_\_\_\_

STREET/SUITE: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ FAX: \_\_\_\_\_ CELL: \_\_\_\_\_

EMAIL1: \_\_\_\_\_ EMAIL2: \_\_\_\_\_

*How did you (the client) learn of De Computis? From who were you referred?*

*CORPORATIONS: Please specify your company's industry(ies):*

Dentist/MD	Software/Technology	Wholesale Distributor
Construction	Retail Store(s)	Food/Restaurant/Nightclub
Transportation	Manufacturing	Real Estate
Media/Production	Advertising/PR	Other: _____

*CORPORATIONS: In what services or products does the company specialize?*

*In which areas does the client need help?*

_____ ACCOUNTING	_____ TAXES: Corporate or Personal
_____ IRS PROBLEMS	_____ CA TAX Problems
_____ Reducing Taxes	_____ Staff Training
_____ Improving Profits	_____ Retirement Planning
_____ Incorporation	_____ SBA/Loan Package Presentation
_____ Partnerships Issues	_____ Equity Capital Sourcing

(OTHER IMPORTANT INFORMATION): \_\_\_\_\_

## OFFICE USE ONLY: GENERAL

Firm Prospectus Mailed On (MG): \_\_\_\_\_ Contact Entered QB Online System (TR): \_\_\_\_\_  
Follow Up Call On (MC): \_\_\_\_\_ Contact in MS Outlook Front Desk (MG) : \_\_\_\_\_  
Client Interview Meeting (MC/RA): \_\_\_\_\_ VCard to MC/TR/MM/RA/JN/ BQ (MG): \_\_\_\_\_  
Pricing Sheet Completed (MC/RA): \_\_\_\_\_ Retainer (MC/RA): \_\_\_\_\_ Invoiced (TR): \_\_\_\_\_  
Engagement Docs Signed (MC): \_\_\_\_\_ Client (Green) File Created (MG): \_\_\_\_\_  
(1) \_\_\_ Client Services Agreement w/ Confidentiality Agreement (2) \_\_\_ Project Goals (3) \_\_\_ Federal 8821(s)  
(4) \_\_\_ CA-FTB \_\_\_ CA-EDD and \_\_\_ CA-BOE (5) \_\_\_ Payment Registration Form (Credit Card)

## OFFICE USE ONLY: AUDIT/TAX/OTHER

Audit/Project Rider As Required (Check Below): \_\_\_\_\_ IRS Form 2848 (if audit): \_\_\_\_\_  
 Tax Preparation  IRS/State Audit 2848 Signed To: \_\_\_\_\_  
 Business Examination  Divorce Rep \_\_\_\_\_