

HELLO,

**Are you ready to work?** We sure are! In order to start the foundation of our partnership we request the following things:

FOR BUSINESS OWNERS

- Accept the link to your client portal (all documents must be submitted there)
- Current contact information: physical and mailing address, phone number etc.
- Provide a copy of your Employment Identification Number (EIN)
  
- Copy of Articles of incorporation, organization, or Operation Policy (**if applicable**)
- Your Business License (**if applicable**)
- LLC (**if applicable**)
- Provide a copy of your Secretary of State Number (**If applicable**)
- Form 1099 -MISC
- Record of gross income and expenses
- Your summary of income and expenses
- A profit and loss statement from your computer software package (such as QuickBooks.) etc.
- Payroll schedule and employee handbook (**If applicable**)
- Sales Tax Account Information (**If applicable**)
- Prior year tax returns (2 years)
- Copies Bank, Credit Card, Loan statement begin with the month prior to engagement unless “Catch up” work is request.

**Your success is vital to our success. Let's win together.**