



FLEMING & CO., Certified Public Accountants

New Client Form (Business)

We would like to take this opportunity to welcome you as a new client and to thank you for your business. We look forward to being of service to you, now and in the future.

Please print clearly

Date _____

Full Business/Non-Profit Name _____

What type of entity do you have? S-Corp* LLP C-Corp Exempt LLC Partnership

Federal ID #** _____ State Employment # _____

Secretary of State # _____ State Sales Tax # _____

What state did you incorporate in? _____ Exempt Entity Charitable Registry # _____

Do you have a corporate book? Yes ___ No ___ Where is it located? _____

Main Contact Person _____ Title _____

Address _____

City _____ State _____ Zip Code _____

Business Phone # _____ Cell Phone # _____

Social Security # _____

E-mail _____

Preferred method of contact? Email ___ Call _____ Both ___ No Preference _____

Are you a returning client? Yes _____ No _____ Referred by _____

***Please provide us with a copy of the S-Corp acceptance letter.**

****Please provide us with a copy of the IRS FEIN letter**

SHAREHOLDER/PARTNER INFORMATION

Shareholder/Partner _____ Title: _____

Address _____

City _____ State _____ Zip Code _____

Social Security # _____ Shareholder Interest _____%

Shareholder/Partner _____ Title: _____

Address _____

City _____ State _____ Zip Code _____

Social Security # _____ Shareholder Interest _____%

Shareholder/Partner _____ Title: _____

Address _____

City _____ State _____ Zip Code _____

Social Security # _____ Shareholder Interest _____%

Shareholder/Partner _____ Title: _____

Address _____

City _____ State _____ Zip Code _____

Social Security # _____ Shareholder Interest _____%

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. To guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.