TAX SOLUTIONS US EA LLC

Business Onboarding Organizer

GENERAL INFORMATION	
Principal business/profession	
Principal IRS business code	
Business Formation Type?	Sole Prop LLC Partnership S Corp
State Registration?	
State of LLC Registration? LLC is a disregarded entity, how are your taxes filed?	Single Member Partnership SCorp
Business Name	
Business Address	
City, State, Zip	
Phone and Email	
Website	
Year company was founded	
Employer identification number (EIN)	
Accounting method	Cash Accrual
Number of years using current accounting method	
Do you have inventory?	Yes No
Inventory Method	Cost lower cost/market other
lf other, explain	
Do you use an inventory program?	Yes No
If yes, name and type	
(cloud, desktop, etc.)	

Do you use accounting software?	Yes No
If yes, name and type	
(cloud, desktop, etc.)	
Do you have payroll?	Yes No
Do you pay sales tax?	Yes No
Do you file 1099?	Yes No
Do you have Members or	
Shareholders?	
How many Members	
How many Shareholders	
Number of company shares issued?	
Are you able to provide a Balance	Yes No
Sheet and Profit and Loss	
Statement?	
Approximately how many products	
do you sell in a year?	
Approximately how many services	
do you provide in a year?	
How many employees?	
Do you materially participate in the	Yes No
business?	
Do you own commercial real estate,	Yes No
in which to conduct business?	
Estimated gross receipts?	\$
Do you have company governance	Yes No
documents in place?	
Last update?	
Do you have any foreign interest?	Yes No
If yes, please explain	
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Duplicate as many times as necessary	
MEMBER(S)/SHAREHOLD(S)	
Name:	
Address:	
City, State, Zip	
Phone/Email	
Title	
Does this member have a financial interest?	Yes No
If yes, please explain?	
If no, how are they compensated?	
Social Socurity Number:	
Social Security Number: Number of shares held:	
	ć
Amount of capital invested?	\$
MEMBER(S)/SHAREHOLD(S)	
Name:	
Nume.	
Address:	
City, State, Zip	
Phone/Email	
Title	
Does this member have a financial	Yes No
interest?	
If yes, please explain?	
If no, how are they compensated?	
Social Security Number:	
Number of shares held:	
Amount of capital invested?	\$
, anount of capital invested:	