GOODING O'HARA & MACKEY, PS

Certified Public Accountants

New Client Intake Form – NON-INDIVIDUAL

PLEASE PRINT ALL INFORMATION CLEARLY AND LEGIBLY

Entity type: *(circle one)*	**S-Corp** **C-Corp** **Partnership** **Fiduciary** **Non-Profit**
Entity Name	
DBA	
EIN	
Primary Contact Name	
Primary Telephone #	(circle one) **Home** **Work** **Mobile**
Fax #	
Email Address	
Street Address or PO Box	
City, State, Zip (+4)	
Alternate Contact Name / Ph #	
NOTES:	

OFFICE USE ONLY

DATE: _______________ APPT DATE: _____________

AO / JM / NO

_____ Assign client number: __________

_____ Enter client info into Office Tools

_____ Sync Contact

_____ Enter base info into Lacerte (year ___________)

_____ Lavender (Non-Individual) card stock cover sheet

_____ Yellow processor sheet with K-1s (no K-1s for C-Corps)

_____ Create file (R/L tab, label & stamp front)

_____ Receive and copy prior returns

_____ Project, Assign Work

_____ Input prior return for organizer

_____ Pro-forma to current year

_____ Create Bookkeeping file (if needed)

Fee estimate _________________

Fiscal Year End _________________