



New LLC & Bookkeeping Client Information Sheet

Tax and Bookkeeping

Client/Contact: _____

Address: _____

Phone/Fax: _____

Email/Web: _____

Entity Type:

C-Corp S-Corp Partnership Sole Prop
 LLC Trust Individual Fed ID or Soc Sec # _____

Will R&R be preparing your tax returns?

Business Yes No
Year End: Calendar Fiscal _____
Initial Franchise Yes No Incorporation Date _____
State Franchise Yes No Multiple States Yes No

States: _____

3 LLC Names:

1. _____
2. _____
3. _____