

KIRAN CPA PC

ONBOARDING FOR COMPANY TAX RETURN

☐ CORPORATION

☐ S-CORPORATION

☐ LLC

☐ PARTNERSHIP

☐ NON-PROFIT

BUSINESS NAME: _____

FEDERAL ID NUMBER: _____

ADDRESS: _____

PHONE NUMBER: () _____ Email: _____

BUSINESS ACTIVITY: _____

COMPANY BEGINNING DATE: _____

STATE WHERE INCORPORATED: _____

BEGINNING BALANCE: _____ ENDING BALANCE: _____

GROSS INCOME /SALE FOR THE YEAR: _____ \$

RECEIVED INTEREST & DIVIDEND: _____ \$

OTHER INCOME: _____ \$

TOTAL INCOME _____ \$

EXPENSES

SALARY /WAGES PAID: _____ \$

TAXES AND LICENSES: _____ \$

BENEFITS PAID TO EMPLOYEE: _____ \$

PHONE: _____ \$

TRAVEL: _____ \$

RENT : _____ \$

INTERNET: _____ \$

TRAINING AND BOOKS: _____ \$

COMPUTER AND PRINTER: _____ \$

SOFTWARE: _____ \$

POSTAGE: _____ \$

OFFICE SUPPLIES: _____ \$

MISC. EXPENSES: _____ \$

OTHER EXPENSES (LIST): _____ \$

OWNERS, OFFICERS AND PARTNERS

(1) NAME: _____

ADDRESS: _____

SOCIAL SECURITY NUMBER; _____

OWNERSHIP PERCENTAGE: _____

(2) NAME: _____

ADDRESS: _____

SOCIAL SECURITY NUMBER; _____

OWNERSHIP PERCENTAGE: _____

(3) NAME: _____

ADDRESS: _____

SOCIAL SECURITY NUMBER; _____

OWNERSHIP PERCENTAGE: _____

Please use separate sheet if you have more than three officers

Note: _____

_____.