



(512) 693-7364
 shelia@austinareatax.com
 www.austinareatax.com

Business Information Worksheet

Please complete general information form below. Return form with a copy of (1) prior year tax return, 2) organizational documents and meeting minutes, (3) balance sheet and profit and loss for tax year and one year prior, if applicable.

Business Name	
Employer Identification Number (EIN)	
Business Address	
City, State, Zip	
Date Business Started	
Type of Entity (LLC, Corporation, Sole Prop)	
If LLC, Tax Entity Type (i.e. sole prop, partnership, S-Corp)	
S Election Effective Date, if applicable	
Tax Matters Contact Information	
Name	
Phone Number	
Email Address	
Principle Business Activity	
Principle Product or Service	
Owner Information	
Were there any changes in ownership percentages during the year?	
Owner #1	
Name	
Tax ID Number (SS No.)	
Address	
City, State, Zip	
Percentage Owner	
Number of Shares/Units, if applicable	
Does owner participate in operations?	
Type of owner (general, limited, etc.)	
Owner #2	
Name	
Tax ID Number (SS No.)	
Address	
City, State, Zip	
Percentage Owner	
Number of Shares/Units, if applicable	
Does owner participate in operations?	
Type of owner (general, limited, etc.)	