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