



Welcome back! Please complete this short form so we can update our records.

Business Legal Name

DBA

Address

E-mail

Telephone

Preferred Contact Method

Email

Phone

List Partners/Shareholders
(Updates can be made on
the next page)

Point of Contact

How would you like to
receive your return and
K-1's?

Electronic

Paper

Have you signed our
current tax engagement
letter? **

Yes

No

**We will not begin until this is received.

Notes/Comments

Partner/Shareholder 1

Full Legal Name

Address

SSN/EIN

E-mail

Telephone

Partner/Shareholder 2

Full Legal Name

Address

SSN/EIN

E-mail

Telephone

Partner/Shareholder 3

Full Legal Name

Address

SSN/EIN

E-mail

Telephone

Partner/Shareholder 4

Full Legal Name

Address

SSN/EIN

E-mail

Telephone