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**BUSINESS CLIENT SETUP FORM**

**PRIMARY CONTACT INFORMATION**

**BUSINESS CONTACT INFORMATION:**

Company Name Federal ID #

Business Phone # Cell Phone#

Is it Okay to text the number provided? Yes No Fax # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address

City State Zip

Email

**ENGAGEMENTS**

Bookkeeping – Payroll –

Controller – Payroll Tax Return –

Annual Business Return – Property Tax Return –

**PROJECTS**

Financial Statement – Annual Payroll Tax Returns – Starting Quarter

Tax Return – Starting Year

Property Tax Return – Starting Year

Payroll Preparation – Starting Pay Date Tax Projection – Starting Year

City Return(s)**:**

UBI# EMP SEC #

L&I #

**CLIENT CUSTOM FIELDS**

Computer Logon

Password

QB Version

QB Admin Password

Hosted Username

EFTPS Pin

EFTPS Password

\_\_\_\_\_  **I give Contract Controllers permission to to install CONNECTWISE on the company desktop**

**Bank Info:**

Bank: \_\_ Password: Security Question(s):

Bank: Password: Security Question(s):

Bank: Password: Security Question(s):

**ADDITIONAL CONTACT**

Mr. Mrs. First M.I. Last Name

Job Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SSN: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ D.O.B. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address

City State Zip

Home # Mobile# Business #

Email



***INTERNAL USE ONLY***

***-------------------------------------------------------------------------------------------------------------------------***

**CLIENT INFORMATION**

**MAIN BUSINESS INFORMATION:**

Client ID Entity Type Year End

Business Name

Assigned To: Partner Manager

Referred By

**ADDITIONAL SETUP**

**ADDITIONAL SETUP**

**1) TPS 4) CONTROLLER FOLDER 7)**

 TPS User Setup  Created Folder

**2) CLIENT DATA FOLDER 5) BUCKSHEET**

 Created Folder  Create task

**3) QUARTERLY FOLDER 6) TAXWISE**

 Created Folder  Setup Client

**NOTES:**