



287 Century Circle, Ste. 200  
Louisville, Colorado 80027  
303-449-7445  
www.TandemCPAs.com

**NEW CLIENT FORM - BUSINESS**

**Date:** \_\_\_\_\_

**Business Legal Name (as it appears on official documents):**

\_\_\_\_\_

**Doing Business As (if applicable):** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Phone (main):** \_\_\_\_\_

**Primary Contact Person Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**E-Mail:** \_\_\_\_\_

**Phone (preferred):** \_\_\_\_\_

**Alternate Contact Person Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**E-Mail:** \_\_\_\_\_

**Phone (preferred):** \_\_\_\_\_

**Business EIN:** \_\_\_\_\_

**Business Activity:** \_\_\_\_\_

**Product or Service:** \_\_\_\_\_

**Completed Tax Return Delivery:**     Paper         Online Portal

**Preferred Contact Method:**         E-mail         Phone

**Whom may we thank for referring you?** \_\_\_\_\_

**Comments:** \_\_\_\_\_