BASIC CLIENT INFO FORM

SECTION I - BUSINESS DETAILS	
1. Legal Name of Company:	
2. DBA Name:	
3. Company Address:	
4. Phone:	
5. Fax:	
6. Email:	
7. Type of Entity:	
8. Description of Business:	
9. Annual Revenue, if any:	
10. Federal ID #:	
11. Last Tax Return Filed, if any:	

SECTION II - ACCOUNTING SOFTWARE DETAILS		
1. Accounting Software Used:	QuickBooks	Other
	If Other, please specify	
2. Existing Accounting File Available:	Yes	No
3. Document Management System:	Yes	No

SECTION III - CONTACT DETAILS

1. Name of Owner / CEO / President:	
2. Phone:	
3. Email:	
4. Name of Accounting Rep, if any:	
5. Phone:	
6. Email:	

SECTION IV - PORTAL USER DETAILS

1. Number of Users:	
2. User 1 Full Name:	
3. Phone:	
4. Email:	
5. User 2 Full Name:	
6. Phone:	
7. Email:	
8. User 3 Full Name:	
9. Phone:	
10. Email:	
11. User 4 Full Name:	
12. Phone:	
13. Email:	