



New Client Setup Checklist

Date: _____

Name: _____

Please complete and return to our office:
Scan and Upload Document to SmartVault
Email: Lea@SRQTax.com
Mail or Drop off: 2906 Bee Ridge Road, Sarasota, FL 34239

Please take a few minutes to fill out the information below.
If you have any questions while completing this form, please do not hesitate to ask.

I have included the following information for Set Up:

Individual Data

YES NO N/A

- Individual Questionnaire
- Three most recent individual Income Tax Returns.

Business Data

- Signed Engagement Letter.
- Business Questionnaire.
- Three most recent business Income Tax returns.
- Payroll Returns: Year to Date. Including Forms 941, RT-6, 940, W2/W3
- Sales Tax Return: Year to Date, returns for all months/quarters.
- Current year-end Income Statement and Balance Sheet.
- If you use QuickBooks Online: Provide Accountant's access to file.
- If you use QuickBooks Desktop: Provide a Backup or Portable Company File.
- If we will be providing bookkeeping services: Provide **VIEW ONLY** access to all business bank and credit card accounts.

	Office Use Only
Date Received	
Received by	