



# APEXVISION

## TAX AND ACCOUNTING SOLUTIONS

550 S. Watters Road, Suite 278 Allen, TX 75013  
(214) 415-8679 Fax (877) 703-9181

### Business Client Information Form

Date \_\_\_\_\_

Business Name \_\_\_\_\_

EIN # \_\_\_\_\_

Business Address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Business Phone \_\_\_\_\_

Business Fax \_\_\_\_\_

Contact Name \_\_\_\_\_

Title \_\_\_\_\_

email Address \_\_\_\_\_

Cell Phone \_\_\_\_\_

Home Phone \_\_\_\_\_

Contact Name 2 \_\_\_\_\_

Title 2 \_\_\_\_\_

Email Address \_\_\_\_\_

Cell Phone 2 \_\_\_\_\_

Home Phone \_\_\_\_\_

Shareholders/Owners 1) \_\_\_\_\_ % \_\_\_\_\_ 3) \_\_\_\_\_ % \_\_\_\_\_  
2) \_\_\_\_\_ % \_\_\_\_\_ 4) \_\_\_\_\_ % \_\_\_\_\_

#### Business Type

\_\_\_ C Corp \_\_\_ Non-Profit \_\_\_ Trust/Estate Fiscal Year Beginning Date \_\_\_\_\_

\_\_\_ S Corp \_\_\_ Partnership \_\_\_ Sole Prop. Annual Sales Estimate \$ \_\_\_\_\_

Do you hire contract labor? \_\_\_ Yes \_\_\_ No

Briefly describe the type of business you own \_\_\_\_\_

Other related/owned companies? \_\_\_\_\_

Who currently processes your payroll? \_\_\_\_\_

#### FOR OFFICE USE ONLY

Client Code \_\_\_\_\_

#### FOR OFFICE USE ONLY

Status  
\_\_\_ A \_\_\_ I \_\_\_ P

Class  
\_\_\_ 1 \_\_\_ 2 \_\_\_ 3

Accounting Software  
\_\_\_ ProSeries \_\_\_ ATX  
\_\_\_ QuickBooks

Compliance Client

\_\_\_ Yes \_\_\_ No

Payroll Tax Deposit

\_\_\_ Client \_\_\_ APEXVISION \_\_\_ N/A

BookKeeper/Tax Specialist

Sales Tax Report

\_\_\_ Client \_\_\_ APEXVISION \_\_\_ N/A

\_\_\_ Paul Shaw, EA

Franchise Tax Report

\_\_\_ Client \_\_\_ APEXVISION \_\_\_ N/A

\_\_\_ Zeno & Associates

Income Tax Return

\_\_\_ Client \_\_\_ APEXVISION \_\_\_ N/A

\_\_\_ Tanika Grover

Income Tax Quarterly

\_\_\_ Client \_\_\_ APEXVISION \_\_\_ N/A

Payroll

\_\_\_ Client \_\_\_ APEXVISION \_\_\_ N/A

Corporate Records

\_\_\_ Client \_\_\_ APEXVISION \_\_\_ N/A

Payroll Cycle \_\_\_ Weekly  
\_\_\_ Every 2 Weeks  
\_\_\_ Monthly

Sales Tax Filings \_\_\_ Monthly  
\_\_\_ Quarterly  
\_\_\_ Semi-Annual

Write-ups \_\_\_ Monthly  
\_\_\_ Quarterly  
\_\_\_ Semi-Annual