

All in One Tax Services

Franchise Tax Client info Sheet

Set up Rates/Requirements:

1. An Application fee of **\$50.00** includes set up in our system and application of your state sales tax number if needed.
2. **Flat Annual Rate of \$25.00** for Zero Tax or under 300K gross income filings or an **Additional Fee: \$25.00** billed for more involved or delinquent filings.
3. You will receive proof of payment either via email (preferred) or via mail.
4. We require a bank account (provide a voided check) or valid Credit Card is on file for timely payment of your Franchise Tax. AMEX, MC and Discover are the only cards accepted via the payment site.

Required Annually:

1. If we do not do your books, you will need to provide us with gross receipts for the year, preferably in spreadsheet format and separated by month.
2. Any changes to contact, account or credit card information (ASAP when change occurs)

About Your Business:

Business Name: _____

DBA: _____

Address: _____

City: _____ State: _____ Zip: _____

Mailing Address (if different): _____

City: _____ State: _____ Zip: _____

Contact Name: _____

Business Phone: _____

Alternate Phone: _____ text? Yes/No

Email: _____

Tax ID No.: _____

State Filing Number: _____

Filing Status: (Circle one): Annual or Initial

Starting Tax year: _____

Filing Due Date: _____

Payment Account information:

Bank Name: _____

Address: _____

City: _____ Zip: _____

Name as it appears on account: _____

OR

Credit Card information:

Number: _____ Exp. Date: _____

CCV. _____

Name as it appears on card: _____

Please provide further info you feel would aid in serving you better!

(For office use only)

Web access number: XT _____

Web Username: _____

Password: _____

Close date: _____

Reason: _____