

Phone: (254) 628-2001
Fax: (254) 628-2003
2201 W. Stan Schlueter Loop Ste. A700 (Plaza De Rosales) 76549

ALL IN ONE TAX SERVICES

Appointment Date: _____
Time: _____

Soyong Yu

Katie Grant

Vickie Miller

Partnership/LLC (S-Corp) Tax information worksheet:

****Please make sure you provide last years return if this is your first year with us****

Company Pertinent Information:

Business Name: _____
DBA (if different): _____ EIN/TIDN: _____
Business address: _____ City: _____ State: _____ Zip: _____
Office Phone: _____ Alt.1 Phone: _____ Alt 2 Phone: _____
New business for the 2012 Tax year? Yes/No Business start date: _____
Industry: _____
Is your business designated an LLC with the State of Texas? Yes ___ No ___
File Number: _____
File with SOS Date: _____

Partners Personal Income Tax info:

Partner 1 Full Name: _____ SSN: _____ DOB: _____
Home address: _____ Apt: _____ City: _____ State: _____ Zip: _____
Home Phone: _____ Cell Phone: _____ Alternate Phone: _____
Is this a new Address for 2012? If so, please check box and provide old address
Previous address: _____ Apt: _____ City: _____ State: _____ Zip: _____
Previous Phone: _____
Do you want \$3 to the Presidential Election Campaign? Yes No
1040ES (Estimate Tax) 4/15 \$ _____ ; 6/15 \$ _____ ; 9/15 \$ _____ ; 1/15/13 \$ _____

Partner 2 Full Name: _____ SSN: _____ DOB: _____
Home address: _____ Apt: _____ City: _____ State: _____ Zip: _____
Home Phone: _____ Cell Phone: _____ Alternate Phone: _____
Is this a new Address for 2012? If so, please check box and provide old address
Previous address: _____ Apt: _____ City: _____ State: _____ Zip: _____
Previous Phone: _____
Do you want \$3 to the Presidential Election Campaign? Yes No
1040ES (Estimate Tax) 4/15 \$ _____ ; 6/15 \$ _____ ; 9/15 \$ _____ ; 1/15/13 \$ _____

Partner 3 Full Name: _____ SSN: _____ DOB: _____

Home address: _____ Apt: ____ City: _____ State: ____ Zip: _____

Home Phone: _____ Cell Phone: _____ Alternate Phone: _____

Is this a new Address for 2012? If so, please check box and provide old address

Previous address: _____ Apt: ____ City: _____ State: ____ Zip: _____

Previous Phone: _____

Do you want \$3 to the Presidential Election Campaign? Yes No

1040ES (Estimate Tax) 4/15 \$ _____ ; 6/15 \$ _____ ; 9/15 \$ _____ ; 1/15/13 \$ _____

Partner 4 Full Name: _____ SSN: _____ DOB: _____

Spouses Name: _____ SSN: _____ DOB: _____

(deceased in 12?) Date: _____

SPOUSE'S OCCUPATION: _____

Home address: _____ Apt: ____ City: _____ State: ____ Zip: _____

Home Phone: _____ Cell Phone: _____ Alternate Phone: _____

Is this a new Address for 2012? If so, please check box and provide old address

Previous address: _____ Apt: ____ City: _____ State: ____ Zip: _____

Previous Phone: _____

Do you want \$3 to the Presidential Election Campaign? Yes No

1040ES (Estimate Tax) 4/15 \$ _____ ; 6/15 \$ _____ ; 9/15 \$ _____ ; 1/15/13 \$ _____

CALL US WITH ANY QUESTIONS! (254) 628-2001