

WealthBuilder FORM 1

Federal TAXPAYER INFORMATION

1. Firm Information

Business Legal Name	doing business as (d/b/a)	Federal Tax ID	State Tax ID
Mailing Address		City	State
Primary Contact Name		Title	email
Business Phone (8am-5pm)	Taxpayer's Mobile/Pager	Alternate Phone	
Type of Organization		Federal Tax Type	
<input type="radio"/> C-Corp <input type="radio"/> S-Corp <input type="radio"/> LLC <input type="radio"/> Sole Prop <input type="radio"/> Partnership <input type="radio"/> LLP <input type="radio"/> Other		<input type="radio"/> Individual (1040) <input type="radio"/> Partnership (1065) <input type="radio"/> Corp	
Number of Employees (not incl. owner)	Estimated Annual Gross Sales	State of Incorporation/Charter	Date started or Charter Date

2. Accounting Software

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- Please mark one
- The company uses only paper records and no computerized records.
 - The company uses MS EXCEL or another spreadsheet for accounting records
 - The company uses Intuit's QuickBooks software. VERSION: PC 2004 or newer MAC QBOnline PC2003 or older
 - The company uses another software package. Specify _____

3. Services Requested

<input type="checkbox"/> Tax Preparation & Filing - Current Year <input type="checkbox"/> Federal Only <input type="checkbox"/> Federal + States <input type="checkbox"/> Tax Preparation & Filing - Prior Years <input type="checkbox"/> Tax Debt issues or IRS issues <input type="checkbox"/> Tax Planning <input type="checkbox"/> Other Tax Issues	Financial Planning <input type="checkbox"/> General Financial Planning <input type="checkbox"/> Retirement Accounts / IRA's <input type="checkbox"/> College Savings / 529's <input type="checkbox"/> Annuities <input type="checkbox"/> Life Insurance
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4. Certification

WealthBuilder Tax Inc. (WealthBuilder) shall NOT be responsible for the refusal, failure, or delay in transmitting my tax refund information or in any delay in returning completed tax forms to me. I have given to the Preparer all required documents and WealthBuilder shall not be responsible for documents not given to them at the time the return is filed. All documents given to WealthBuilder are true and complete. I agree to pay WealthBuilder in full upon completion of work unless prior written arrangements have been made BEFORE work starts. If, for any reason, I decide to have WealthBuilder cease work on my account before it is complete, I understand that I will still remain responsible for payment of services up to the point that work was stopped. Payment cannot be denied for the reason that a finished work product is not given to me. Wealthbuilder is under no obligation to give me any work in progress or completed work or work papers until payment in full has been made and that these items mentioned are WealthBuilder's property until it is paid in full. The Prepare and WealthBuilder cannot be held liable for any inaccuracies, errors, or omissions not initiated by the Preparer. In no event shall we be liable for any damages other than the amount paid by the Client. The Preparer or Agent has NO control over your tax refund after submission to the tax agencies. I agree not to hold WealthBuilder, its employees, or agents responsible for any delays and/or incomplete transactions and I allow WealthBuilder to handle these transactions for me/my company at our own risk.

IMPORTANT: WealthBuilder will NOT guarantee any tax refund or delivery date of such refund under any circumstance.

Taxpayer's or Representative's Signature	Date
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Please create a 5-digit personal identification number (PIN) for filing.

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