

Company Data Request

Date: ___/___/___

(Complete this form for each related company)

Company Name: _____

Address: _____

Address: _____

Phone #: _____ Fax #: _____

EIN #: _____ Date of Business Start: ___/___/___

Fiscal Year End: ___/___

Company Type: _____ (C-Corp, Sub-S, LLC, Sole Proprietor etc.)

Owners: _____ Title: _____ %: _____
Main Contact

Email address: _____ *Main Contact*

Owners: _____ Title: _____ %: _____

Owners: _____ Title: _____ %: _____

Owners: _____ Title: _____ %: _____

Related companies explained and other notes: _____

CPA Name: _____ Contact: _____

Other items for discussion:

- Family members identified
- Leased employees
- Existing Retirement Plans in Place
- Sub-contractors
- Part-time employees & Re-hires



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