



Orlando Downtown Office
605 E. Robinson St, Suite. 450
Orlando, FL, 32801

Avalon Park Office
3520 Avalon Park East Blvd, Suite 1
Orlando, FL 32828

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BUSINESS CLIENT FACT SHEET

Please complete the information below. Thank you!

Incorporated Name: _____

DBA: _____

EIN #: _____ Business Type/Field: _____

Entity Classification: S Corp Partnership/LLC Sole Proprietorship Single Member

Contact Person: _____

Title: _____ Telephone: _____

Alternate Phone: _____ E-mail: _____

Fax (if Available): _____ Alternate Email: _____

Name of Owner/Partners: _____

Business Address: _____

Location: Same as above Different (if different please list below)

Website: _____

How did you hear about us? _____

For Office Use Only

Please indicate services:

_____ Tax _____ Accounting _____ Payroll _____ Bookkeeping
_____ Sales Tax _____ Hosted Client _____ Other: _____

Relationship? _____