



# Client Information Sheet

Ledger Medial  
Accounting Services  
1 N. Main St.  
Greenville, SC 29601

(864)655-7098  
www.LedgerMedial.com

Business name \_\_\_\_\_

Type of business \_\_\_\_\_

Business structure  Sole Proprietor  S Corporation  C Corporation  Partnership  Not-for-Profit

Business Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

County \_\_\_\_\_ Business EIN# \_\_\_\_\_

Phone number \_\_\_\_\_ Email \_\_\_\_\_

Primary contact name \_\_\_\_\_

Primary contact phone number \_\_\_\_\_ Email \_\_\_\_\_

## Services Needed (check all that apply)

- |                                       |   |  |
|---------------------------------------|---|--|
| <input type="radio"/> Individual Tax  | <input type="radio"/> Monthly Bookkeeping               | <input type="radio"/> Payroll              |
| <input type="radio"/> Business Tax    | <input type="radio"/> Entity Registration (LLC, etc...) | <input type="radio"/> Help with tax notice |
| <input type="radio"/> Tax Planning    | <input type="radio"/> Business Advisory                 | <input type="radio"/> QuickBooks Cleanup   |
| <input type="radio"/> Tax Projections | <input type="radio"/> Sales Tax                         | <input type="radio"/> Hospitality Tax      |

## How did you hear about us?

If **other**, will you please specify? \_\_\_\_\_

If **referred**, whom may we thank? \_\_\_\_\_

Are you behind on any income tax filings?  Yes  No

We are attempting to remain paperless as possible. Do **you need a paper copy of our product (tax return(s), financial statements, etc...)?**  Yes  No

*\*You can change this or request paper any time, however a paper copy is \$20.*

We are dedicated to operating as efficiently as possible in order to provide the maximum quality of service at the minimum possible price. **Are you willing to correspond via electronic signature and document exchange using our secure online portal?**  Yes  No

If seeking monthly services, **are you willing to grant us access to online bank & credit card accounts** for efficiency and timely issuance of monthly financial statements?  Yes  No

*\*We merely access the monthly statements for data entry and for our records.*