

ONE STOP CONSULTING SHOP LLC: Onboarding

What services do you need? If you are unsure, please take a moment to answer the following questions which will help us guide the conversation as what assistance you need right now, in the near future and down the road.

Please answer Yes, No or Unsure for the following questions about your new (or existing) business:

1. Are you the only (sole) owner of your business?
2. Have you already created an LLC or Corporation?
3. Do you have insurance for your business?
4. Have you already paid anyone to help you in the business?
 - a. Did you obtain a w9 or w4/i9 from them?
 - b. Were taxes withheld?
5. Do you sell products or anything tangible or do you make improvements to tangible items?
6. Do you rent office space?
7. Do you work from home (any part of the time or entirely)?
8. Do you collect payments from your clients using:
 - a. Square
 - b. Zelle
 - c. Cash app
 - d. Paypal
 - e. Other credit card processors:
 - f. Other 3rd party app:
9. Is your bank account for the business co-mingled with personal transactions?
10. Is the credit card for the business co-mingled with personal transactions?
11. Are you currently tracking your bookkeeping (business income and expenses)?
 - a. And if so, using what?
 - i. Quickbooks online
 - ii. Quickbooks desktop
 - iii. Other accounting software
 - iv. Excel spreadsheet/Google sheets
12. Do you need us to handle the following items for you?
 - a. Tangible Personal Property tax return due April 1st (to your County)
 - b. Annual report with Sunbiz (for LLCs and Corporations)
 - c. Corporate Tax Return due March 15th (for S-corps, Partnerships and C-Corps)
 - d. 1040 Tax Return due April 15th (Individuals w 1099s or single member LLC/disregarded entity)
 - e. Issue 1099s to your contractors & file with IRS due annually by January 31st

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Company Information:

Company Legal name:	
FEIN:	
Contact Name:	
SSN:	
Business Telephone/Cell Number:	
Primary Email Address for Portal:	
Number of Shareholders:	
Tax Structure:	S-Corp / C-Corp / Partnership / Disregarded Entity (Schedule C)
Can we contact you by text message (SMS)?	
What is your preferred method of communication?	
What product or service does your business provide?	

Banking Credentials:

Bank/Credit Card Name:	
View Only Account Login and Password:	
Bank/Credit Card Name:	
View Only Account Login and Password:	
Bank/Credit Card Name:	

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View Only Account Login and Password:	
Bank/Credit Card Name:	
View Only Account Login and Password:	

Payroll Information: Please provide prior quarter payroll tax reports.

RT-6 Number:	
Bank Routing and Account Number:	
Are there benefits to be set up?	
Current Payroll Provider:	

Sales & Use Tax Information: Please provide the prior filed copy.

Location Address	
Sales Tax Certificate Number:	
Business Partner Number:	
Reporting Schedule:	
Bank Routing and Account Number:	

Other items you want to make us aware of:

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