



BUSINESS CLIENT INFO FORMS

510 NW Mock Ave Blue Springs, MO
Phone: (816) 229-2992 FAX: (816) 229-3280
 Email: frontdesk@normastax.com

Sole Proprietors DO NOT complete this form, use form B-1 instead

Business Type: _____ **Corporation** _____ **S-Corporation** _____ **Partnership**

Did we prepare your 2024 business return? _____ yes _____ no If no, please provide a copy of the most recent return. If you are new to us, or this is your first year taxed as an S-Corporation, please provide your IRS S-Election Acceptance letter – this is REQUIRED.

Company Name _____ Federal ID # _____

Address: _____ City _____ State _____ Zip _____

Contact Name _____ Contact Phone Number _____

Email: _____

Shareholder/Partner Information:

Only complete this section if we have not prepared your return before OR if there are changes from last year.

Name	Social Security #	Address	% of Ownership	# of Shares, if applies

If you are NOT a current bookkeeping client, please provide the following:

- Profit & Loss Statement ending 12/31 OR a detailed spreadsheet OR written listing of total income and total expenses by category
- Balance Sheet OR a detailed list of all assets and liabilities including balances in all checking, credit cards, savings and investment accounts at year end
- Copies of all W-2's and 1099's given to employees and/or sub-contractors
- Equipment list of items purchased during this tax year costing more than \$500 (include date purchased, cost and description)
- Equipment list of items disposed of, no longer in service or sold during this tax year
- Purchases – cost of items bought for resale
- Ending Inventory – cost of items bought for resale that you still have on hand
- Total of personal money put into or taken out of company (draws or loans – this does not include your W-2 wages)
- Health insurance premiums paid for or reimbursed to stockholders
- Did you receive as a reward, award, or payment for property or services OR sell, exchange, or otherwise dispose of a digital asset OR have a financial interest in a digital asset? If yes, bring all documentation
- Did you have any foreign income, foreign assets or foreign property associated with this business? If yes, bring all documentation

IMPORTANT NOTES:

Please drop off all your tax information to us **BEFORE March 2nd** (unless you have a scheduled appointment) OR contact us to file an extension. We will NOT automatically file an extension for you. These tax returns must be completed prior to your personal return (with the exception of C-Corporations). Please do not schedule a personal appointment until we notify you that your business return is finished. Blocks of time are reserved for your personal tax appointments to prevent additional time delays.

Partnerships and S Corporations tax returns are due Monday, March 16, 2026.

Regular Corporation or C-Corporation tax returns are due Wednesday, April 15, 2026.