



**BUSINESS CLIENT INFO FORMS**

619 NW R.D. Mize Road Blue Springs, MO

Phone: (816) 229-2992 FAX: (816) 229-3280

Email: [frontdesk@normastax.com](mailto:frontdesk@normastax.com)

Business Type: \_\_\_\_\_ Corporation \_\_\_\_\_ S-Corporation \_\_\_\_\_ Partnership  
\_\_\_\_\_ LLC taxed as an S-Corporation \_\_\_\_\_ LLC taxed as a Partnership

Did we prepare your 2022 business return? \_\_\_\_\_ yes \_\_\_\_\_ no If no, please provide a copy

Company Name \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Contact Name \_\_\_\_\_ Contact Phone Number \_\_\_\_\_

**Shareholder/Partner Information:**

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

**If you are not a current bookkeeping client, please provide a Profit and Loss Statement and Balance Sheet as of 12/31/2023. If you do not have these documents, a detailed spreadsheet or written listing of the following information must be included:**

- Business Income
- Business Expenses totaled and listed by category (i.e., advertising, supplies, etc)
- Copies of all W-2's and 1099's for employees and/or sub-contractors
- Equipment listing items purchased costing more than \$500 (include date purchased, cost and description)
- Equipment listing 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)
- Balance in all checking, credit cards, savings and investment accounts at year end
- Health insurance premiums paid for or reimbursed to stockholders

**IMPORTANT NOTES:**

**The tax returns for Partnerships, S Corporations and LLC's taxed as a Partnership or S-Corporation are due Friday, March 15, 2024.** Please drop off all your tax information to us **BEFORE March 1<sup>st</sup>** (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 have to be completed prior to your personal return. Please do not schedule a personal appointment until we notify you that your business return is completed. Blocks of time are reserved for your personal tax appointments to prevent additional time delays.

**Regular Corporation or C-Corporation tax returns are due Monday, April 15, 2024** and we must have your information prior to April 1<sup>st</sup>. You may file your personal return before these returns are completed.