



Peritum LLC

TAX | SUPPORT | CONSULTING

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Entity Intake Sheet

ENTITY INFORMATION

Entity Name _____

Physical Business Address _____

City _____ State _____ Zip _____

FEIN _____ Entity Type _____ Tax Form _____
(Sch. C, 1065, 1120S, 1120, 990, Other)

State of Incorporation _____ Business Phone _____

BUSINESS OWNERS

Business Owner #1

Name _____ SS# _____ D.O.B. _____

E-mail _____ Phone _____ % Ownership _____

Business Owner #2

Name _____ SS# _____ D.O.B. _____

E-mail _____ Phone _____ % Ownership _____

MAIN CONTACT (if different from Owner)

Name _____ E-mail _____

Phone _____ Title _____

Reason for
contacting
Peritum:

Accounting

Tax Preparation

Tax Planning

Payroll