



Jennifer Youngs Bookkeeping Services LLC

New Client Intake Form

Please fill out and sign at the bottom.

Email completed form to jennifer@jennifersbooks.com

Or bring to: 2200 South Plaza Dr #1

Call (605) 787-3230 with questions

Name _____ Social _____

Phone: _____ Employer _____

Spouse _____ Social _____

Phone: _____ Employer _____

Address: _____ Health Insurance thru the marketplace?

_____ Yes/ No Who: _____

Dependents:

Name Social Security # Date of Birth

Name Social Security # Date of Birth

Name Social Security # Date of Birth

Name Social Security # Date of Birth

Income:

Company W2 / 1099 / K1 Self / Spouse
(Circle one) (Circle one)

Company W2 / 1099 / K1 Self / Spouse
(Circle one) (Circle one)

W2 / 1099 / K1 Self / Spouse

Company

(Circle one)

(Circle one)

- Use back if additional space is needed
- COMPANY INFORMATION:

Legal Name of Business

EIN

Address

Phone

City, State, Zip

Email

Owner %

Owner %

Owner %

Owner %

Accounting Program

Business Bank Account

Username

User Name

Password

Password

EFTPS

SUTA Due

Pin

Username

Password

Password

Sales Tax / Excise Tax State

Other

Username

User Name

Password

Password

Other

Other

Username

User Name

Password

Password

Other

Other

Username

Password

User Name

Password

Please Check all Services Needed:

- Payroll- \$40 each
- Payroll Program - \$25 a month
- Payroll Taxes - \$25 a month
- Quarterly Reports - \$200
- W2/W3 - \$20 each
- Year End Taxes - Depends on forms
- Sales Tax - \$50 month
- Reconcile - \$100 month
- Accounting Software - \$50 month
- Invoice - Depends on how many
- Deposits - Depends on how many
- Run Errands - 58 cents a mile and \$10 an hour
- Set Up Budget - \$150
- Monthly Budget Change - \$50

