



CORPORATE/LLC ORGANIZATION INFORMATION SHEET

PROPOSED BUSINESS NAME:	BUSINESS NAME OPTION 2:	BUSINESS NAME OPTION 3:
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PRIMARY SHAREHOLDER FIRST NAME	LAST NAME	SOCIAL SECURITY NUMBER	
DATE OF BIRTH	DRIVERS LICENSE NUMBER	STATE	EXP. DATE
STREET ADDRESS			
CITY	STATE	ZIP	
PHONE NUMBER	EMAIL ADDRESS		

SHAREHOLDER #2 FIRST NAME	LAST NAME	SOCIAL SECURITY NUMBER	
DATE OF BIRTH	DRIVERS LICENSE NUMBER	STATE	EXP. DATE
STREET ADDRESS			
CITY	STATE	ZIP	
PHONE NUMBER	EMAIL ADDRESS		

SHAREHOLDER #3 FIRST NAME	LAST NAME	SOCIAL SECURITY NUMBER	
DATE OF BIRTH	DRIVERS LICENSE NUMBER	STATE	EXP. DATE
STREET ADDRESS			
CITY	STATE	ZIP	
PHONE NUMBER	EMAIL ADDRESS		

PREFERRED METHOD OF CONTACT: PHONE _____ E-MAIL _____ TEXT _____

I HAVE READ AND AGREE WITH THE PROFESSIONAL SERVICES STATEMENT ON THE REVERSE SIDE OF THIS DOCUMENT.

SIGNED _____ DATE _____

*******FOR OFFICE STAFF USE ONLY*******

BUSINESS NAME: _____ STATE FORMATION: _____

S-CORPORATION ELECTION TYPE: _____

Professional Service Agreement – Corporation

As professionals, we adhere to standards established by the appropriate professional and governmental bodies. We **will not** audit or verify the data you submit, although we may ask you to clarify it. Our work does not include procedures designed to discover defalcations or other irregularities, should they exist. We will use our judgment to resolve questions in your favor where the law is unclear or where there are conflicts of interpretation in the law. No information you provide to J.W. Hopp & Associates, Inc. is privileged. You agree to answer our questions and provide us information so that we can complete the return. You agree to provide all information to us in time for us to finish the return before the due date. **If all information is not received fourteen (14) days before the due date, we will require you to file an extension.**

Reviews and Inquiries: Frequently the taxing authority will send inquiries regarding information provided on your tax return. Simple inquiries and requests for additional information will typically be handled by us at no charge.

Audits: The return is subject to examination by the taxing authorities. In the event of an audit, you will be required to produce documents, records, and other evidence to substantiate all of the entries shown on the tax return. If an examination does occur, we will represent you if you so desire; however, these additional services are not included in our fee for the preparation of your return.

Limited Warranty: In the event that we make an error on a tax return, we will change the return at no charge. If the error was discovered after the tax return was filed, we will prepare an amended return for no additional fee. If the error is discovered as the result of an audit, we will pay all interest and penalties on the portion of the tax due related to **OUR** error.