



Internal use only
Completed by: _____

Donovan CPAs

New Business Client Information

Date _____

Tax Year End _____

Referred by _____

EIN # _____

Business Information

Entity Type: C Corp S Corp Partnership Tax Exempt Single Member LLC

Entity Name: _____

Primary Contact: _____

Address: _____

City/State/Zip: _____

County: _____

Phone: _____ Cell: _____ Fax: _____

Website: _____

Contact Information

Name: _____

Address: _____

City/State/Zip: _____

County: _____

Cell: _____ Home: _____ Other: _____

Email: _____

Electronic Enhancements

You may now send/receive your tax documents securely through our Client Portal as well as receive text message notifications when your tax return is ready to be picked up.

Would you like to sign up for the Secure Client Portal? Yes _____ No _____

Email used for the portal _____

Would you like to receive Text message Notifications? Yes _____ No _____

Cell Phone # _____

Spouse Cell Phone # _____