

New Client Onboarding Form

Contact Information:

Full Name: _____

Foreign Company Name: _____

Address: _____

Phone # _____

Email: _____

United States Corporate Business Name to Register: _____

Estimated # of sales per month: _____

Average amount per sale/month: _____

Estimated Revenue per month: _____

Does the business require merchant services: _____

Does the business require payroll services: _____

Brief Description of the business:

United States Corporate Ownership:

Owner 1/Executive

Name: _____

Title: _____

Address: _____

Ownership %: _____

Phone # _____

Email: _____

Owner 2/Executive (If necessary)

Name: _____

Title: _____

Address: _____

Ownership %: _____

Phone # _____

Email: _____

Owner 3/Executive (If necessary)

Name: _____

Title: _____

Address: _____

Ownership %: _____

Phone # _____

Email: _____

Owner 4/Executive (If necessary)

Name: _____

Title: _____

Address: _____

Ownership %: _____

Phone # _____

Email: _____

Owner 5/Executive (If necessary)

Name: _____

Title: _____

Address: _____

Ownership %: _____

Phone # _____

Email: _____

Financial Information (US & Foreign):

Bank Account Information #1

Bank Institution: _____

Bank Account # _____

Routing # _____

Address: _____

Bank Account Information #2

Bank Institution: _____

Bank Account # _____

Routing # _____

Address: _____

Bank Account Information #3

Bank Institution: _____

Bank Account # _____

Routing # _____

Address: _____

Bank Account Information #4

Bank Institution: _____

Bank Account # _____

Routing # _____

Address: _____

Additional Information:

Any additional accounting needs or additional business services needs

Authorization: Authorization

By checking the box above, I authorize Stax Accounting Group to collect, store, and use my personal and business information to provide accounting services to me. I understand that my information will be kept confidential and will not be shared with third parties without my consent.

Name: _____

Your Signature: _____

Date: _____

Thank you for taking the time to complete this form. We look forward to working with you!