

# AMERICA'S BUSINESS MANAGER, INC.

2435 - First Avenue North  
St. Petersburg, FL 33713-8820  
Tel: 727.896.1042 - Fax: 727.821.2754

## NEW CLIENT SET UP

Company Name: \_\_\_\_\_  
Street Address: \_\_\_\_\_  
Street Address 2: \_\_\_\_\_  
City, State Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Fax: \_\_\_\_\_  
Contact Person: \_\_\_\_\_  
Owner: \_\_\_\_\_  
E-Mail: \_\_\_\_\_

Type of Entity: \_\_\_\_\_  
FEIN: \_\_\_\_\_  
Sales Tax? (Monthly - Quarterly - Annually) \_\_\_\_\_  
Sales Tax Certificate #: \_\_\_\_\_  
Beverage or Communication Tax? \_\_\_\_\_  
Certificate #: \_\_\_\_\_  
Payroll? (Weekly - Bi-Weekly - Monthly) \_\_\_\_\_  
UC #: \_\_\_\_\_  
UC Rate: \_\_\_\_\_  
P/R Tax Deposits: \_\_\_\_\_

Work (Monthly - Quarterly - Annually) \_\_\_\_\_  
Fee (Payment Method): \_\_\_\_\_  
Referred By: \_\_\_\_\_  
Beginning date of service: \_\_\_\_\_  
Pick up method: \_\_\_\_\_

FOR RECEPTIONIST USE ONLY
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_____ Added to pick up list	_____ Added to Outlook	_____ Company set up in Quickbooks
_____ Files made	_____ Client binder made	_____ Pick up folder made
_____ Automatic payment set up	_____ Memorized billing entered - QB	_____ Welcome Letter