

Client Master Data Sheet – Company

Taxpayer

Company Name	
Last Name	
Frist Name	
Street	
House Number	
Postal Code	
City	
Religion	
Date of Birth	
Place of Birth	
Nationality	
Tax Identification Number	
Business Phone	
Mobile Phone	
E-Mail	

Company Information

Legal Form of Company	
Business Purpose	
VAT ID No.	
Commercial Register Entry / Registration Number	
Shareholders (Ownership Structure, Tax Office, Tax Number)	

Bank Account Information

IBAN	
BIC	

Tax Infomation

Tax Number	
Responsible Tax Office	
Applicable Tax Types (Income Tax, VAT, Wage Tax)	
Previous Tax Consultant	

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Advance Notifications

Preparation of annual financial statements
from:

Preparation of tax returns from:

Bookkeeping Services

Period of bookkeeping services:	monthly	quarterly	annually
Supervision of client-prepared bookkeeping:	monthly	quarterly	annually

Payroll and wage accounting:

Other bookkeeping services:

Other Information

Accounting Software Used

☐ lexoffice

☐ sevDesk

☐ Unternehmen Online

Assigned Staff Member (to be filled in by the tax consultant)