

WALK IN 11/2/2021**Individual Information****Date of Intake: 11/02/21 \$500 retainer**Name: **Patrick Bolte**Address: **206 Juniper St N PO #488**City, State & Zip: **Soap Lake, WA 98851**Email: Phone: **509 793-3039**

Entity Information

Legal Name: **B&B Mancaves NW**

DBA:

Address: **115 North Daisey ST (No Mail)**City, State & Zip: **Soap Lake, WA 98851**Primary Business Activity/Type: **Retail-Repair of Slot Machines****Business Entity:**

- LLC **Patrick Bolte 51% Mark Beyer 49%**
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Date Opened Business: **08/13/2021** Date Incorporated: _____Gross Yearly Revenue: Number of Employees: **0****Tax Information:**

- Tax ID: **87-2433836**
- UBI: **604 797 229**
- Letter ID: _____

Main Bills per month

Cost of Goods is about \$29,500 to start
\$600 per month Rent W-S-G included in rent
Security System -Simply Safe \$25 per month
IFIBER-\$59.95

1. How did you hear about us? **Sandy Huntwork**
2. Why are you seeking our services? Needs help to set up...See Below
3. What services are you interested in?
 - Business Tax Return Partnership **\$500 per year**
 - Financial Statements-Included in Bookkeeping
 - Bookkeeping **\$125-\$250**
 - Sales Tax **\$50-\$100**
 - Consulting (Financial/HR/Operations/Marketing) **\$150 per hr**
 - Individual Income Tax Return **\$350-\$700**
 - Start Quickbooks file **\$150**
 - Revise SOS **\$50**
 - Set up with **DOR \$60 plus \$50**
 - Reseller Permit **\$50 Use for Cost of Goods Only**
4. What is your preferred form of communication? text

Other comments, questions, concerns, or needs:

DOR Reports
Quickbooks

Banking Information

Bank Name: **Umpqua Bank**

User Name: _____

Password: _____

Please bring in a copy of your last Bank Statement.

Square

User Name: _____

Password: _____

Will need to do taxes:

Mark Beyer

Social Security

DOB

Home Address

Patrick Bolte

Social Security

DOB

Home Address