

Langley and Associates LLC

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Business Owner & Officer Information Form

New Client _____ Existing Client _____

Existing Clients, please fill in the starred items, for everything else you only need to fill in what has changed,
unless using to report Owner and Non-Owner Officer compensation.*

Date: _____

*Business Name: _____

*Tax ID/EIN: _____

Owner Information

Number of people/entities with an ownership interest: _____

Number of officers who are not owners: _____

*You can repeat the Owner Information and Non-Owner Officer Information pages as much as needed. This form
can also be used to report Owner and Non-Owner Officer compensation.*

Owner Information

- **Owner #** _____
 - **First Name or Business Name:** _____
 - **MI:** _____
 - **Last Name:** _____
 - **Title:** _____
 - **SSN/EIN/Tax ID:** _____
 - **Street Address:** _____
 - **City:** _____
 - **State:** _____
 - **Country (if not U.S.):** _____
 - **Entity Type**
 - **Individual** _____
 - **Estate** _____
 - **Exempt Organization** _____
 - **Trust** _____
 - **Other Entity Type:** _____ **Description:** _____
 - **Ownership Percentage or Number of Shares:** _____
 - **Receives a W-2 from the business:** Yes _____ No _____
 - **Amount of compensation:** _____

Non-Owner Officer Information

- **Non-Owner Officer # _____**
 - **First Name:** _____
 - **MI:** _____
 - **Last Name:** _____
 - **Title:** _____
 - **SSN/ Tax ID:** _____
 - **Street Address:** _____
 - **City:** _____
 - **State:** _____
 - **Country (if not U.S.):** _____
 - **Percent of Stock Owned (if applicable)**
 - **Common** _____
 - **Preferred** _____
 - **Percent of time devoted to business:** _____
 - **Receives a W-2 from the business: Yes** _____ **No** _____
 - **Amount of compensation:** _____