

Client interview checklist for obtaining an IRS Employer Identification Number (EIN)

Instructions

To quickly obtain a federal tax ID (EIN), fill in this 5-minute PDF form, then submit it to Lawyer's Aid Service by email or fax.

Lawyer's Aid screens the form for you, deals with the IRS instead of you, and reports the EIN to you immediately, usually same or next day. You receive the SS-4 form by mail for your records. For two related EINs, simply fill out two checklists.

On many of the boxes, handy tips appear when your mouse hovers there.

A. Checklist for IRS EIN (Employer Identification Number)

All answers are required.

1. Entity name: _____
2. Entity type: Corporation Non-profit corporation
 Limited liability company* Professional association
*Number LLC members: _____ other: _____
3. Date of formation of entity: _____ State or country of formation: _____
4. a. Street address of entity: _____ b. Mailing address, if different: _____

5. Principal officer's full name as in Social Security records: _____
Social Security number: _____ Title: President other: _____

6. Tax classification:

For-profit corporations and professional associations only:

- Check this box if you plan to apply for Subchapter S Status. (You must also file IRS Form 2553 within 75 days. A copy is included in our Texas Corporate Outfits.)

Limited liability companies only (choose one tax classification for the LLC):

- Default: Single-member LLC is taxed as sole proprietorship
Multi-member LLC is taxed as a partnership
- C Corporation (must file IRS Form 8832 within 12 months to elect this classification)
- S Corporation (must file IRS Form 2553 within 75 days to elect this classification)

7. Closing month of accounting year: December (recommended) other: _____

8. Fill in this box only if there will be employees in the next 12 months:

Highest number of employees expected in next 12 months:

Agricultural: _____ Household: _____ Other: _____

Earliest date wages may be paid: _____

Do you expect to pay \$4,000 or less in wages next calendar year (Jan. – Dec.)? Yes No

9. Type of business or activity (e.g. healthcare, construction, transportation, food service, real estate, retail): _____

(continued)

10. Specific merchandise sold or produced, or services provided:

11. Business phone:

12. A Lawyer's Aid Service representative is authorized as third-party designee to obtain the EIN.

13. Notify me of EIN by: fax phone e-mail (Original is mailed with bill.)

Fax, phone, or email address: _____

B. Order form

Prices may change without notice.

1. Tell us about your order:

One EIN (completed same or next day) **\$50**

Two related EINs (completed same or next day) **\$65**

The related EIN order has been recently submitted. OR is submitted with this order.

2. Please pay [here](#), or send your \$50 or \$65 check simultaneously to:

Lawyer's Aid Service, P.O. Box 848, Austin, Texas 78767-0848

Let this checklist serve as your invoice.

3. Your information:

Attorney's name: _____ Phone: _____

Contact name: _____ Phone: _____

Firm name: _____ Fax: _____

Street address: _____

City: _____ State: _____ Zip: _____ Country: _____

Email: _____ Type or sign your name below to confirm you are sending simultaneous payment (required)

4. Submit to Lawyer's Aid Service your way:

Email to maindesk@
LawyersAidService.com

Print and fax to
(888) 474-4218

Call (888) 474-2112
to place your order

Your further instructions, if any: