



nestegg
BOOKKEEPING

APPLICATION FOR A BUSINESS SERVICE

BUSINESS CONTACT INFORMATION

Company Name or Individual Name:

Primary Business Address:

City:

State:

Zip Code:

Phone:

Fax:

Website:

<u>Officer Name:</u>	<u>Social Security:</u>	<u>D.O.B.</u>	<u>Telephone:</u>	<u>Street:</u>	<u>City:</u>	<u>Zip Code</u>
<u>Officer Name:</u>	<u>Social Security:</u>	<u>D.O.B.</u>	<u>Telephone:</u>	<u>Street:</u>	<u>City:</u>	<u>Zip Code</u>
<u>Officer Name:</u>	<u>Social Security:</u>	<u>D.O.B.</u>	<u>Telephone:</u>	<u>Street:</u>	<u>City:</u>	<u>Zip Code</u>

BUSINESS AND CREDIT INFORMATION

Date Business Commenced:

Sole Proprietorship: | Partnership: | Corporation: | Other:

How long at current location:

Current or Past Bookkeeper's Name and Phone Number:

Current or Past Attorney's Name and Phone Number:

Liability Insurance Carrier Name and Phone Number:

Federal I.D. Number (EIN):

Board of Equalization Number:

Business License Number:

<u>Signature:</u>	<u>Date</u>	<u>Signature:</u>	<u>Date</u>
<u>Signature:</u>	<u>Date</u>	<u>Signature:</u>	<u>Date</u>

APPLICATION FOR A BUSINESS SERVICE CONTINUED (2)

BANK REFERENCES

<u>Bank Name (1):</u>				<u>Contact:</u>				
<u>Address:</u>		<u>City:</u>		<u>State:</u>		<u>Zip Code:</u>		
<u>Phone:</u>			<u>Log In ID:</u>			<u>Password:</u>		
<u>Type of Account:</u>								
<u>Security Question and Answer:</u>								
<u>Security Question and Answer:</u>								
<u>Security Question and Answer:</u>								
<u>Security Question and Answer:</u>								
<u>Bank Name (2):</u>				<u>Contact:</u>				
<u>Address:</u>		<u>City:</u>		<u>State:</u>		<u>Zip Code:</u>		
<u>Phone:</u>			<u>Log In ID:</u>			<u>Password:</u>		
<u>Type of Account:</u>								
<u>Security Question and Answer:</u>								
<u>Security Question and Answer:</u>								
<u>Security Question and Answer:</u>								
<u>Security Question and Answer:</u>								
<u>Bank Name (3):</u>				<u>Contact:</u>				
<u>Address:</u>		<u>City:</u>		<u>State:</u>		<u>Zip Code:</u>		
<u>Phone:</u>			<u>Log In ID:</u>			<u>Password:</u>		
<u>Type of Account:</u>								
<u>Security Question and Answer:</u>								
<u>Security Question and Answer:</u>								
<u>Security Question and Answer:</u>								
<u>Security Question and Answer:</u>								
<u>Bank Name (4):</u>				<u>Contact:</u>				
<u>Address:</u>		<u>City:</u>		<u>State:</u>		<u>Zip Code:</u>		
<u>Phone:</u>			<u>Log In ID:</u>			<u>Password:</u>		
<u>Type of Account:</u>								
<u>Security Question and Answer:</u>								
<u>Security Question and Answer:</u>								
<u>Security Question and Answer:</u>								
<u>Security Question and Answer:</u>								
<u>Signature:</u>		<u>Date</u>		<u>Signature:</u>		<u>Date</u>		
<u>Signature:</u>		<u>Date</u>		<u>Signature:</u>		<u>Date</u>		

APPLICATION FOR A BUSINESS SERVICE CONTINUED (3)			
<u>BANK REFERENCES</u>			
<u>Bank Name (5):</u>		<u>Contact:</u>	
<u>Address:</u>	<u>City:</u>	<u>State:</u>	<u>Zip Code:</u>
<u>Phone:</u>	<u>Log In ID:</u>	<u>Password:</u>	
<u>Type of Account:</u>			
<u>Security Question and Answer:</u>			
<u>Security Question and Answer:</u>			
<u>Security Question and Answer:</u>			
<u>Security Question and Answer:</u>			
<u>AGREEMENT</u>			
1. By submitting this application, you authorize The NestEgg Group, LLC. to act on your behalf where applicable and to make inquiries into any banking, business/trade, government agency or employee reference that you have supplied as per our agreement.			
2. By signing this agreement you authorize The NestEgg Group, LLC access to any financial institutions that we are given Online Banking information, either on this form or by future emails, letters or Facsimiles.			
3. By listing your Credit Card Information Below you give The NestEgg Group, LLC authorization to charge the card listed for services as outline in the proposal agreement and or for monthly payments towards your account.			
4. By signing this form, you acknowledge that if your account should ever go past due, any/all charges due will be charged to your credit card listed below.			
5. By Signing this form you also acknowledge that per your proposal, if at anytime your account is charged due to a past due balance and if the account is in default (more than 30 days past due) that any/all discounts extended to you as a professional courtesy will be waived and that amount added to the final charge along with any appropriate finance charges.			
6. In accordance with the State of California and laws pertaining to accounts in default any/all fees deemed necessary by The NestEgg Group, LLC to collect on a debt will be passed back to you if legal proceedings of any type become necessary.			
7. I UNDERSTAND that if no credit card is listed I understand and agree that all above terms are still accepted and agreed upon. I also understand that in the unfortunate situation of a past due or default balance, that the terms of "default" (30 days past due) are VOIDED and that any/all monies due are at the discretion of The NestEgg Group, LLC and payable within 72 hours of the due date of any bill sent to you via certified mail.(received or refused)			
8. I understand that I am also personally guaranteeing this agreement.			
<u>CC Type:</u>	<u>Number:</u>	<u>Expiration Date:</u>	<u>CVV Code</u>
<u>Billing Address:</u>	<u>City:</u>	<u>Zip Code:</u>	
By Signing below, I acknowledge that the information on this application is true to the best of my ability and that its sole purpose will be used by NestEgg Group, LLC to Manage my financial records, taxes and business matters as outlined in the proposal.			
<u>Signature and Title</u>	<u>State ID #</u>	<u>Issue Date</u>	<u>Expiration Date</u>
<u>Signature and Title</u>	<u>State ID #</u>	<u>Issue Date</u>	<u>Expiration Date</u>
<u>Signature and Title</u>	<u>State ID #</u>	<u>Issue Date</u>	<u>Expiration Date</u>
<u>Signature and Title</u>	<u>State ID #</u>	<u>Issue Date</u>	<u>Expiration Date</u>