
EIN Application Prep Sheet

From Holdings — getholdings.com

Print this and fill it in **BEFORE** going to [IRS.gov/EIN](https://irs.gov/EIN)

Why This Sheet Exists

The IRS online EIN application has a **15-minute session timeout**. If you stop to look something up, you'll lose your progress and have to start over. Fill in every answer below, then breeze through the application in 5 minutes.

Section 1: Entity Type

What type of entity are you? (circle one)

- Sole Proprietor / Individual
- Limited Liability Company (LLC)
- Corporation
- Partnership
- Trust
- Estate
- Non-Profit / Tax-Exempt Organization
- Church / Church-Controlled Organization
- Other: _____

If LLC — Number of members: _____

Tip: Choose your LEGAL structure, not your tax election. If you formed an LLC (even if electing S-Corp later), select LLC.

Section 2: Reason for Applying

Why are you requesting an EIN? (circle one)

- Started new business
 - Hired employees
 - Banking purposes
 - Created a pension plan
 - Changed type of organization
 - Purchased active business
 - Other: _____
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Section 3: Responsible Party

The person who owns or controls the entity.

Full legal name: _____

(Exactly as it appears on your Social Security card)

SSN: _____ - _____ - _____

(Or ITIN if applicable)

Title/Role: _____

(Member, Owner, Managing Member, President, etc.)

Section 4: Business Information

Legal name of entity: _____

(EXACTLY as it appears on your Articles of Organization / formation docs)

Trade name / DBA (if different): _____

Business address:

Street: _____

City: _____ State: _____ ZIP: _____

County: _____

Mailing address (if different from above):

Street: _____

City: _____ State: _____ ZIP: _____

Section 5: Business Details

What type of business? (describe in a few words)

Examples: "Freelance graphic design," "Online retail," "IT consulting," "Restaurant"

Date business started or acquired: _____ / _____ / _____ (MM/DD/YYYY)

Closing month of accounting year: _____

(December for most businesses — only use a different month if your accountant told you to)

Section 6: Employment Information

Do you expect to have employees in the next 12 months? Yes / No

If yes — first date wages will be paid: _____ / _____ / _____

Highest number of employees expected in next 12 months:

- Agricultural: _____
- Household: _____
- Other: _____

(If you're solo with no plans to hire, answer: No, 0, 0, 0)

Section 7: Checklist Before Applying

Make sure you have:

- All sections above filled in
- Your SSN (or ITIN) memorized or written down
- Your Articles of Organization nearby (for exact legal name)
- 10–15 minutes of uninterrupted time

- A way to save/print the confirmation (have a printer ready or know how to screenshot)
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How to Apply

- Go to [IRS.gov/EIN](https://www.irs.gov/ein)
- Click "Apply Online Now"
- Click "Begin Application"
- Enter your answers from this prep sheet
- Review and submit
- **SAVE YOUR EIN** — screenshot, print, or save the PDF immediately

Available: Monday–Friday, 7:00 AM – 10:00 PM Eastern Time

After You Get Your EIN

Your EIN: _____ - _____

(Write it here as soon as you get it)

Date received: _____ / _____ / _____

Immediate Next Steps

- Save/print EIN confirmation page
 - Open business bank account → getholdings.com
 - Update state registration with EIN (if required)
 - Fill out a W-9 with your new EIN (have it ready for clients)
 - Set up expense tracking from day one
 - Apply for business licenses (city/county, if needed)
 - Register for state taxes (if selling products or hiring)
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Keep This Document

Store this prep sheet with your business formation documents:

- Articles of Organization
 - Operating Agreement
 - EIN confirmation letter (CP 575 — arrives by mail in 4–6 weeks)
 - Business bank account details
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