

Interview Questionnaire

Client: _____

Current Bookkeeping software?

How do you organize receipts and financial documents?

Business structure? How many employees?

What type of payroll system do you use?

Anything unique about how you do banking? Do you use business credit cards? Receive payments via merchant services?

Anything unique about how you would like your information presented?

How do you prefer I communicate with you?

What is your biggest challenge in your business right now? Do you need anything else from me?

Anything else I should know?