

New Client Form

Name: _____

Address: _____

City: _____ State: _____

If it's a business, tell us the type:

- Are you currently using bookkeeping software? _____
- Do you have inventory? _____
- What is your monthly or annual sales volume? _____
- Are you required to report sales or use tax? _____
- Are there any regulatory issues pending? _____
- Which services do you need?: (Describe them below).