



New Client Intake Form

General Data:

Name(s): _____

Address: _____

City, State & Zip Code: _____

Office/Home Telephone: _____

Primary Cell: _____ Work: _____

Secondary Cell: _____ Work: _____

Primary Email: _____ Secondary: _____

Entity Information:

Legal Name: _____

DBA: _____

Address: _____

City, State and Zip Code: _____

Primary Business Activity/Type: _____

Entity: Sole Proprietor / Partnership / S-Corporation / C-Corporation / LLC

Date of Incorporation: _____ Tax ID: _____

Calendar / Fiscal Year _____ If Fiscal, what is year-end? _____

Gross Yearly Revenue: _____ Number of employees: _____

Contact Information:

Officers/Management/Employees authorize to communicate sensitive financial information with:

| NAME | TITLE | PHONE # | EMAIL |
|------|-------|---------|-------|
| | | | |
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Why JBM?

1. How did you hear about us?

2. What services are you interest in?

- Bookkeeping/Accounting
Consulting (Remote Controller / Operations Management / Marketing)
Financial Statements (Compiled / Reviewed / Audited)
Payroll / Payroll Taxes Sales Tax / Solid Waste Tax
Accounting department setup
Individual Income Tax Return
Business Tax Return (Corporate / Partnership / Non-Profit)

3. How many transactions do you have on your statements each month (average)?

| ACCOUNT TYPE | AVERAGE MONTHLY TRANSACTIONS |
|----------------|------------------------------|
| Checking 1 | |
| Checking 2 | |
| Checking 3 | |
| Checking 4 | |
| Savings 1 | |
| Savings 2 | |
| Credit Card 1 | |
| Credit Card 2 | |
| Credit Card 13 | |
| Other | |

4. How quickly do you need us to begin providing the services checked above?

5. Do you use any form of accounting or tax software now? If so, which software?
(Excel, Quickbooks, Peachtree, etc.)

6. What are your expectations of our firm?

7. How frequently would you like your Trusted Business Advisor/CPA to contact you? __

8. What is your preferred form of communication (phone, email, etc.)?

Other comments, questions, concerns, or needs:

For Internal Use:

Account Manager: _____ Meeting Date: _____

Engagement Letter
Date Sent: _____

Email address: _____

Signed Letter(s) of Engagement Received _____