

BETTER BOOKKEEPING & BUSINESS CONSULTING

CLIENT QUESTIONNAIRE

COMPANY NAME: _____

LEGAL ADDRESS: _____

EMAIL: _____ PHONE NUMBER: _____

YEAR BUSINESS STARTED: _____ ARE YOUR TAXES CURRENT: _____

FEDERAL EIN#: _____

BUSINESS STRUCTURE:

<input type="checkbox"/> SOLE PROPRIETOR	<input type="checkbox"/> PARTNERSHIP
<input type="checkbox"/> LLC	<input type="checkbox"/> LIMITED PARTNERSHIP
<input type="checkbox"/> S CORP	<input type="checkbox"/> C CORP

DO YOU HAVE EMPLOYEES? _____ IF YES, HOW MANY? _____

IF YES, WHAT IS YOUR UTAH UNEMPLOYMENT ACCOUNT # _____

IF YES, WHAT IS YOUR STATE WITHHOLDING ACCOUNT # _____

DESCRIBE YOUR BUSINESS OPERATIONS: _____

DO YOU SELL RETAIL ITEMS: _____ STATE SALE TAX #: _____

WHAT SERVICES ARE YOU INTERESTED IN:

<input type="checkbox"/> EXPENSE MANAGEMENT	<input type="checkbox"/> BANK RECONCILIATION
<input type="checkbox"/> ACCOUNTS PAYABLE	<input type="checkbox"/> ACCOUNTS RECEIVABLE
<input type="checkbox"/> PAYROLL	<input type="checkbox"/> END OF YEAR PREP
<input type="checkbox"/> BOOK CLEAN UP/CATCH UP	<input type="checkbox"/> BUSINESS MANAGEMENT

WHAT APPS DO YOU USE TO RUN YOUR BUSINESS? _____

ADDITIONAL INFO I SHOULD KNOW: _____

