



Getting to Know Your Business

Preparing for Your Complimentary Consultation

Mahalo for scheduling your complimentary consultation!

I'd love to learn more about you and your business. Please take about 10 minutes to complete this questionnaire before our meeting. Your responses will help me understand your business, identify your bookkeeping needs, and make the most of our 15–30 minute consultation.

Think of this as a conversation starter—not a test. The more I know about your business, the better I can tailor my recommendations to help you succeed.

Tell Me About Your Business

Business Name: _____

DBA (if applicable): _____

Business Entity Type (☐ Sole Proprietor ☐ LLC ☐ S-Corp ☐ C-Corp ☐ Partnership ☐ Nonprofit):

EIN: _____

Business Address: _____

Phone Number: _____

Website: _____

Primary Contact Name & Title: _____

Best Email Address: _____

How Can I Help?

☐ Monthly Bookkeeping ☐ Catch-Up/Cleanup Bookkeeping

☐ QuickBooks Online Setup ☐ Payroll Support

☐ Accounts Payable ☐ Financial Reporting

☐ Tax Prep Coordination ☐ 1099 Preparation

☐ Other: _____

Your Current Bookkeeping

Current Accounting Software (☐ QuickBooks Online ☐ QuickBooks Desktop ☐ Xero ☐ Wave ☐ Excel/Manual Records ☐ Other): _____

How long have you been in business?: _____

Do you currently have a bookkeeper or accountant? ☐ Yes ☐ No:

If yes, please provide their name and contact information:

Your Business Finances

Number of business bank accounts: _____

Number of business credit cards: _____

Number of loans or lines of credit: _____

About Your Business

Approximate monthly transactions: _____

Do you have employees? ☐ Yes ☐ No: _____

If yes, how many: _____

Do you collect sales tax/GET? ☐ Yes ☐ No: _____

Accounting method (☐ Cash Basis ☐ Accrual Basis ☐ Unsure):

Your Goals & Challenges

What are your biggest bookkeeping or financial challenges right now?

What would you like your bookkeeping to help you accomplish over the next year?

Is there anything else we should know about your business?

Communication Preferences

Preferred method: ☐ Email ☐ Phone ☐ Text

Best time to reach you: _____

What to Expect During Your Consultation

- ✓ Review your current bookkeeping process
- ✓ Discuss your business goals and challenges
- ✓ Identify opportunities to streamline your bookkeeping
- ✓ Recommend services tailored to your business
- ✓ Review estimated monthly investment and next steps
- ✓ Answer your bookkeeping and QuickBooks questions

Most consultations last approximately 15–30 minutes.

Thank You!

Mahalo for taking the time to complete this questionnaire.

Your responses will help me prepare for our consultation so we can focus on your business goals, answer your questions, and discuss solutions tailored to your needs.

If you have any questions before your appointment, please don't hesitate to contact me.