Initial Consultation Worksheet

In order to prepare for our initial consultation, please have the following information ready to share. This will help me to better understand your business and your current bookkeeping needs. If you have any questions or aren't sure how to answer something, that is ok! We will talk about it in our meeting.

1. Tell me about your business:
    a. Service or product based?
    b. How long have you been operating?
    c. Customer base?
    d. LLC or Corp?
2. If service based:
    a. Do you sell any physical inventory?
    b. Are there any non-inventory items you use in your service?
3. If product based:
    a. How often do you file sales tax? Is this a service you want me to provide?
    b. How do you track inventory, and what systems are you using?
4. Do you have a current accounting software you are using?
    a. Have you had a prior bookkeeper?
    b. Do you have a CPA or accountant?
    c. Can I have accountant access to view, prior to giving a quote?
5. How many business bank accounts and cards do you have?
    a. Do you commingle any personal expenses in the business account?
    b. Approximate number of transactions every month?
    c. How are you handling receipts?
6. How are you being paid from customers? What payment processing sites are you using, and how are they being accounted for in your books currently?
    a. Do you want me to handle invoicing for your business?
7. Do you have bills due every month for your business?
    a. Do you want Accounts Payable services?
8. How often would you like communication from me?
    a. Monthly reports that they would be interested in?
    b. Monthly conversation?
    c. Do you want me to liaise with your accountant, or help you find an accountant?