

# My Clean Books, LLC - Client Intake Form

Full Name:

Business Name:

Email Address:

Phone Number:

Business Type (Contractor / Property Owner / Airbnb Host / Other):

Time in Business:

Monthly Revenue:

Number of Bank/Credit Card Accounts:

Are your books up to date?

Current system used (QuickBooks / Excel / None):

Services needed (Monthly / Cleanup / Both):

When do you want to start?

Additional Notes: