Consultation Questions

1. Tell me about your business.
2. What is your business entity?
3. Do you have payroll? How many employees do you have?
4. How do you track payroll hours? Do you have employee benefits (401k, health insurance, vacation?
5. Do you have inventory?
6. Do you have vendors? How many?
7. What are the average customer invoices per month?
8. How many bank accounts/ credit cards does your business have?
9. Are your tax returns current?
10. Do you report sales tax?
11. Do you have any plans on expanding or scaling back?
12. What are some issues you face within your business?
13. What do you need from me as your bookkeeper?
14. Is there a certain way you like your financial reports set up?
15. How often would you like to communicate?
16. Which accounting rule do you use cash-basis or accrual accounting?
17. Are you currently using software, or do you prefer a particular one?
18. What is the monthly price range you are looking for?

Below please include best contact and email!