

Client Contact Information

Name*

First:

Last:

Email*

Phone*

Do you prefer to be contacted by phone or email?

Company Details:

Company Name:

Company Address:

What is your website?

What is your job title?

Briefly describe what your company does:

When did your company start?

How many employees do you have?

Which type of entity is your company (LLC, S-Corp, C-Corp, Sole-Proprietor)?

Do you file federal taxes on a cash basis or accrual?

Who is your CPA and what firm are they with?

What bank is your main business account with?

Accounting Needs

What accounting software do you use? (If QuickBooks indicate Desktop or Online)

What payroll software or company do you use?

How many check/debit transactions do you have each month?

Do you enter bills and payments or checks only?

Do you pay 1099 vendors?

How many invoices do you generate each month?

Do you accept credit cards?

Do you collect sales tax?

Do you track inventory in Quickbooks or other software?

How many bank accounts do you have?

How many credit cards do you have?

Have you worked with a bookkeeping service before? (circle one)

Yes

No

What services are you looking for us to provide? (circle all that apply)

Transaction Entry

Client Billing

Payroll

Financial Statements

Year End Tax Package

State Tax Reporting

Cash Flow Reporting

Business Start-Up Assistance

Bill Pay

Monthly Account Reconciliation

City Tax Reporting

Budgeting/Forecasting

Other

Accounting Closing Questions

What three areas do you want to improve in your accounting?

Are you happy with your current accounting solution?

Anything else we should know?