New Client Checklist

How to use:
Try using this handy form in your initial meeting with your new client to establish their requirements and help you recommend the best QuickBooks solution for their needs. The form is divided into six stages:
1. Client Profile: Collect basic information about your client’s business
2. Needs Assessment: Identify which business processes they use
3. QuickBooks Features & Solutions: Based on your needs assessment, specific QuickBooks features will be recommended. Review these and identify any additional features your client will benefit from in order to recommend the appropriate solution
4. Mileage: If your client needs to track mileage, collect their vehicle profile information
5. QuickBooks Onboarding: A checklist to standardize and streamline your firm’s onboarding process for your new QuickBooks Online clients
6. QuickBooks Self-Employed profile: Collect the additional information you need to set up a new QuickBooks Self-Employed client

New Client/Business Profile

Company profile	Profile information	Additional details/notes
Company name (DBA):		
Legal name (if different from above):		
Industry:		
Primary contact name:		
Primary phone number:		
Primary mobile number:		
Primary email:		
Company website:		
Address: Street, City		
Address: State, Zip		
Tax entity/Tax form:		
FEIN/SSN:		
Accounting year end:		
Year(s) in business:		
Current overall accounting solution:		
Accounting team members:		
Annual gross revenue:		
Number of employees: (if applicable)		
Affiliated companies: (if applicable)		
Any other additional notes or advisories		