**CLIENT QUESTIONNAIRE**

Company name and address:

Your name:

Phone Number:

Email Address:

In a few sentences, describe your business?

What type of entity is it? Sole-Prop, Scorp, LLC, regular Corp, Partnership?

How many years have you been in business?

On average what are your monthly gross sales?

Are you currently using QuickBooks? If so, desktop or online? If not, what are you using?

If using QuickBooks, would you let me review the QB file?

Are your books up to date? If not, how current are they?

How many bank and/or credit card accounts are involved?

On average, how many transactions per month for all bank accounts and credit card accounts? If you don’t know, sample pdfs of all accounts for an average month would be helpful to see.

Do you have employees? How many employees? Do you outsource payroll? If so, with what company?

Do you have independent contractors? If so, how many? Will you want these done for you?

How do you prepare your invoices? And do you want these done for you?

How do you pay your bills? And do you want this done for you?

Do you report sales tax? If so, how often are you required to? And do you want this done for you?

Why are you changing Bookkeepers or why did your last bookkeeper leave?

When would you need me to start?