



SISU ACCOUNTING LLC

Business New Client Intake Form

Welcome! We are glad you are here and are looking forward to hearing about your business. Our goal is to make your business as financially successful as possible. **Please note charges may be incurred for any services provided, including consultations. If you have questions regarding our fee structure, please don't hesitate to ask.** We are happy to explain. Thank you for the opportunity to partner with you in your business' success. We look forward to working with you.

Entity Information:

Legal Name: _____

DBA: _____

Address: _____

City, State & Zip: _____

Primary Business Activity/Type: _____

Entity: (Circle One) **Sole Proprietor/ Partnership/ S-Corporation/ C-Corporation/ LLC/ Non- Profit**

Date of Incorporation: _____ Tax ID: _____

Calendar / Fiscal Year: _____ If Fiscal, what is year end? _____

Gross Yearly Revenue: _____ Number of Employees: _____

Owners:

Name(s): _____

Phone #(s): _____

Email(s): _____

Soc Sec #(s) : _____

Title(s): _____

% Ownership: _____

Operations

Please provide a brief overview of your business goals:

Why Sisu Accounting?

1. How did you hear about us?

2. Why are you looking to make a change or seeking the services of our firm?

3. What services are you interested in?

- Business Tax Return (Corporate / Partnership / Non-Profit)
- Financial Statements
- Bookkeeping
- Payroll / Payroll Taxes
- Sales Tax
- Consulting (Strategic / Financial / HR / Operations / Marketing)
- Individual Income Tax Return

4. Do you use any form of accounting or tax software now? Is so, which software?
(Excel, QuickBooks, Peachtree, etc.) _____

5. What is your preferred form of communication (phone, email, etc.)? _____

Other comments, questions, concerns, or needs:
