

# New Client Questionnaire

Please complete and return to: [lezliem@mckennaaccounting.com](mailto:lezliem@mckennaaccounting.com)

Your Name: \_\_\_\_\_

Cell phone number: \_\_\_\_\_ Date of birth: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Email: \_\_\_\_\_

Spouse Name: \_\_\_\_\_

Cell phone number: \_\_\_\_\_ Date of birth: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Email: \_\_\_\_\_

Home Address: \_\_\_\_\_

\_\_\_\_\_

Dependents:

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SS#: \_\_\_\_\_

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SS#: \_\_\_\_\_

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SS#: \_\_\_\_\_

Tax and accounting services needed:

☐ Bookkeeping

☐ Account reconciliations

☐ Payroll

☐ Sales tax

☐ Personal tax return preparation

☐ Business tax return preparation

Business Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone number: \_\_\_\_\_

Business Industry: \_\_\_\_\_

EIN: \_\_\_\_\_

Entity Type: ☐ LLC ☐ S Corporation ☐ Partnership ☐ Sole Proprietor

☐ C Corporation

Date Incorporated: \_\_\_\_\_

State Incorporated: \_\_\_\_\_

What accounting software are you currently using?

☐ None

☐ QuickBooks Desktop

☐ QuickBooks Online

☐ Other: \_\_\_\_\_

How many employees do you have?

☐ 0-5

☐ 10-20

☐ 20-30

☐ 31+

Do you have inventory?

☐ Yes

☐ No

What is your sales volume?

☐ \$10,000 – \$250,000

☐ \$250,00 - \$500,000

☐ \$500,000 - \$1,000,000

☐ >\$1,000,001