



**Client Intake Form**

*Tell me about yourself so I can help!*

Tracy A. Burnett, CPA  
Beankeeper Accounting, LLC  
[Tracy@BeankeeperAccounting.com](mailto:Tracy@BeankeeperAccounting.com)  
207-800-1056 (call, text, or email)

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

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

Best Phone #: \_\_\_\_\_

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

Preferred Contact Method: \_\_\_\_\_

Type of Service Requested: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

<b>Tax Filing Status:</b>	<i>(Check all that apply)</i>
C-corp	_____
S-corp	_____
Partnership	_____
Schedule C	_____
Schedule E	_____
Other	_____

<b>Accounting Software</b>
_____ QuickBooks Desktop
_____ QuickBooks Mac
_____ QuickBooks Online
_____ QuickBooks Self-Employed
_____ Sage
_____ Wave Accounting
_____ Other (Provide Details):
_____
_____

[www.BeankeeperAccounting.com](http://www.BeankeeperAccounting.com)

*I do not provide tax preparation services.*