



Initial Consultation - Questionnaire Scope

Step 1: Please fill out and return to us prior to your consultation appointment to rdbusinesssolutions@gmail.com

Please tell us your company name, industry, size, and a little about your business:

Question	Number or value of items per month	Average Monthly Amount
1	Bank transactions	
2	Purchase invoices	
3	Total transactions	
4	Sales invoices	

Additional questions:

What type of business are you in?	
Are you registered for sales tax?	
How many active trading bank accounts do you have?	
How many other bank accounts do you have (e.g. deposit accounts)?	
How many credit card accounts do you have?	
How many PayPal accounts do you have?	
Do you need payroll journals posting?	
Do you have foreign currency transactions?	
What accounting system do you use?	

Please feel free to let us know of other information you deem will be helpful for us regarding your current business situ