

Almost Heaven Advisors, LLC

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Personal Information

Name:

Address:

Phone Number:

Company Information

Name:

Address:

Phone Number:

Email Address:

Questions

1. Describe your business:

2. What type of entity is your business? (LLC, S Corp, etc.)

3. How many years have you ran this business?

4. What are your monthly gross sales? (On Average)

5. How many employees do you have? Are any of these contractors?
If so, how many?

6. Do you outsource payroll?

7. How many bank and/or credit card accounts do you have?

8. On average, how many transactions per month do you have? (Both bank and credit card accounts)

9. Are your tax returns current? When was the last time you filed taxes?

10. How do you prepare your invoices? Do you want these done for you?

11. How do you pay your bills? Do you want this done for you?

12. Do you have inventory?

13. Do you report sales tax?

14. When would you need me to start?