



New Client Form
Bright Bookkeeping Services

Name of Business _____

Contact Name _____

Email Address: _____

Business Phone Number _____ Cell Phone Number _____

Business Address _____

Mailing Address _____

FEIN Number _____ SC Tax ID Number _____

Type of Business _____

Accounting Method: Cash Basis _____ Accrual _____

Accounting Platform in Place _____ Year _____

Do you manage Inventory _____

Products Sold _____

Do you collect Sales Tax _____ What State _____

Number of Bank Accounts _____

Number of Credit Cards _____

Number of Loans _____ PPP or SBA Loan _____

Average # of Customers _____ # Customers to Invoice _____

Customer List Required Indv./Group _____

List Services Provided _____

Current Payroll Company _____

Number of Employees _____ Number Subcontractors _____

Do you pay commissions or bonuses _____ If so, how often _____

Last completed financial statements date _____

Name of CPA/Tax Accountant _____

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