

New Client Form

1. Company Name
2. Name
3. Phone Number
4. Email Address
5. Preferred Method of Contact
6. Role/Title
7. Company Size – Headcount
8. Company Size – Revenue Annually
9. Could you tell me about your business?
10. What are your goals for the next [3, 6, or 12] months?
11. How have your financial records been kept so far?
12. What are your biggest pain points?
13. Why is this a priority for you now?
14. Are you happy with your current accountant and/or tax practitioner? Why or why not?