Client Questionnaire

Answers don’t need to be long, this is just for me to understand your business and where you’d like to go.

1. What can you tell me about your business?
2. What is your business entity? Sole, LLC, S-Corp?
3. Do you have payroll?
4. Do you have inventory?
5. How many accounts (bank, cc) do you have?
6. Are your returns current?
7. Do you report Sales Tax?
8. Do you have plans to expand or scale back operations?
9. How do you define success?
10. What’s one thing about your business that you are most proud of?
11. If you could solve one challenge, what would it be?
12. How do you think I could add value to your company?
13. If you have had a bookkeeper in the past, can you tell me why you would like to change?