

Nicole Bs Bookkeeping & Administrative Services Client Questionnaire

Thank you for your interest in working with us. We would love to learn more about you.

Please answer the following questions.

** Indicates required question*

1. Email *

2. First Name *

3. Last Name *

4. Company Name *

5. Website *

6. Phone Number *

7. Email Address *

8. Describe your business in a few sentences: *

9. What type of entity is your business? (Sole Proprietor, LLC, S-Corp, Corporation) *

10. How many years have you been in business? *

11. What are your monthly gross sales? (On average) *

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

13. Do you outsource payroll? *

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

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

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

17. Are your books current? When was the last time accounts were reconciled? *

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

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

20. Do you have inventory? *

21. Do you report sales tax? *

22. When do you need me to start? *

23. How did you hear about us?

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