



New Client Intake Questionnaire

Business Information

Legal Business Name: _____

DBA / Trade Name: _____

Business Entity Type (LLC, S-Corp, Partnership, Sole Proprietor):

EIN / Tax ID: _____

Business Start Date: _____

Primary Contact: _____

Phone: _____

Email: _____

Business Address: _____

Bookkeeping Services

What accounting software do you currently use? (QuickBooks, Xero, Excel, Other)

Do you currently reconcile bank/credit card accounts monthly? Yes No

Do you have a chart of accounts already set up? Yes No

Approximate number of transactions per month: _____

Do you need monthly financial reports? Yes No

Any special industries, accounts, or reporting needs? _____

Payroll Services

Number of employees: _____ Number of contractors (1099): _____

Pay frequency: Weekly Biweekly Semi-Monthly Monthly Do you currently have a payroll system? Yes No (If yes, which one?) _____

Do you need: Direct Deposit setup W-2 / 1099 filings Payroll tax deposits New hire reporting

Do you offer employee benefits (health, retirement, PTO)? Yes No

Tax Preparation Services

Have you filed business tax returns before? Yes No Do you currently have a tax preparer or CPA? Yes No Do you need: Business Income Tax Preparation Personal Tax Preparation Sales Tax Filings Payroll Tax Filings IRS/State correspondence support Any prior-year tax issues or amendments? Yes No

Notary Services

Do you need notary services on a recurring basis? Yes No Types of documents you expect to notarize: Business contracts Real estate / loan documents Estate planning (wills, trusts, POA) Other: _____ Will you need mobile notary services? Yes No

Additional Information

How did you hear about Oak & Orange? _____

What are your top 3 priorities we can help with right now?

1. _____

2. _____

3. _____

Notes / Special Requests: _____



Your Hometown partner in business success