



## 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