



DV Accounting & Tax Services LLC
Pelican Payroll Co

705 Meredith Street
Kennett Square, PA 19348
610-864-0263 * Deborah@dvaccounting.com

Personal Information:

Name:

Address:

Phone Number:

Email Address:

Company Information:

Business Name and EIN:

Trade or DBA Name (if applicable):

Address:

Phone Number:

Questions:

1. Describe your business in a few sentences:

2. What type of entity is your business (Sole Prop, LLC, C Corp, S Corp, Partnership):

3. How many years have you been in business:

4. What are your monthly gross sales (estimate is fine):

5. How many employees do you have?
6. Do you use any sub-contractors?
7. Do you outsource payroll? If so, with whom?
8. How many bank and credit card accounts do you have?
9. On average, how many transactions do you have per month on all accounts?
10. Are your tax returns and tax reporting obligations current? When did you last file business and personal returns?
11. How do you prepare invoices? Do you want these done for you?
12. Do you use, or are you familiar, with Quickbooks?
13. How do you pay your bills? Do you want this done for you?
14. Do you have inventory?
15. Do you report sales tax? If so, to how many states?
16. When do you need me to start?