

First Name\*

Last Name\*

Email\*

Phone\*

Business Name\*

Website\*

What type of bookkeeping service are you interested in?

Do you sell products, services, or both?

What point of sales system do you currently use?

Do you currently use Quickbooks Online as your accounting software?

Do you have any business loans?

Do you have any employees or contractors?

What is your business/legal tax structure?

How many business bank accounts/credit cards do you have?

Do you keep your personal and business finances separated?

Are your taxes currently up to date?

When did you last file taxes?

What is your comfort level in discussing your business finances with an accounting professional?

Do you currently have a bookkeeper?

Tell us why you are currently looking for a bookkeeper. What does your ideal bookkeeping solution look like for you?

Tell us any "pain points" you have when it comes to your bookkeeping.

If you were referred to us, whom can we thank for the referral?