

Acire Dynasty, LLC DBA ACIRE FINANCIAL SERVICES

HAWKINSVILLE, GA 31036 478-268-3090 INFO@ACIREDYNASTY.COM

New Client Get Acquainted Questionnaire

(for business owners only)

Name _____ Title _____

Office Physical Address _____

Email _____

Office Phone _____

Fax _____

Home Phone _____ Cell _____

1. Are you the sole owner of the business? ☐ Yes ☐ No

2. If no, who else is involved?

3. Do you currently have a CPA? ☐ Yes ☐ No

If yes, Who? _____

4. Have you ever used a CPA? ☐ Yes ☐ No

5. Are you looking to engage a CPA? ☐ Yes ☐ No

6. Are you considering a change in CPAs? ☐ Yes ☐ No

7. What is your form of business? ☐ Sole Proprietor ☐ Partnership

☐ Corporation (regular) ☐ S-Corporation

☐ LLC (Limited Liability Company)

8. When was the last time you filed your taxes?

Are are current on your business taxes? ☐ Yes ☐ No

9. Have you ever filed for bankruptcy? ☐ Yes ☐ No If yes, when _____

10. How long have you been in business?

11. What does your company do?

12. How many employees do you have? _____ full time _____ part time

New Client Get Acquainted Questionnaire

(for business owners only)

CONTINUE

13. What was your gross sales last year?

14. How are you computing your payroll?

15. Do you ever have problems with tax deposits and/or payroll tax reporting? ☐ Yes ☐ No

16. How have you been keeping your financial data?

17. Are you having any problems with your bookkeeping? ☐ Yes ☐ No

If yes, what?

18. How many bookkeepers have you had in the last five (5) years?

19. How many hours do you spend on bookkeeping per week?

20. Do you owe any money to the IRS? ☐ Yes ☐ No

21. Do you ever have to come up with a lump sum at the end of the year or after taxes are filed? ☐ Yes ☐ No

22. Do you make estimated tax payments? ☐ Yes ☐ No

23. Do these estimated payments cover your yearly tax bill? ☐ Yes ☐ No

24. What do you hope to gain from our consultation?

25. What are your goals for your business in the next six (6) months?

one (1) year?

five (5) years?

26. What are your goals for your business in the next six (6) months?

one (1) year?

five (5) years?

27. What are your goals for yourself in the next six (6) months?

one (1) year?

Acire Financial Services (Acire Dynasty, LLC)

478-268-3090 sales@aciredynasty.com

New Client Get Acquainted Questionnaire

(for business owners only)

CONTINUE

five (5) years?

28. Do you have a business plan? ☐ Yes ☐ No If yes, for how many years?

29. Do you have a financial planner? ☐ Yes ☐ No

Are you interested in financial planning? ☐ Yes ☐ No

31. Do you have a broker? ☐ Yes ☐ No

31. Do you have a will? ☐ Yes ☐ No

32. Do you have a living trust? ☐ Yes ☐ No

33. Are you interested in a living trust? ☐ Yes ☐ No

34. What investments do you have? (Check all that apply)

☐ Stocks ☐ Bonds ☐ Mutual Funds ☐ Collectibles ☐ Rental Property

35. Do you have a retirement plan/fund? ☐ Yes ☐ No

If yes, approximately how much is in it? \$

36. What would you like your yearly income to be at retirement?

37. At what age would you like to retire?

38. Please check a box to rate the following in importance: five (5) being the highest of importance to one (1) being the lowest of importance.

Highest importance -- Lowest importance

A. Saving money on taxes ☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

B. More profit from your business

(making more money) ☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

C. Accurately prepared tax return to

avoid audit ☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

D. Retirement funding ☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

E. Education/College funding ☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

F. Having good and proper investments ☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

G. Having control over your finances ☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

H. Filing taxes or getting out reports or

financial statements in a timely manner ☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

I. More time away from the business or able

to take more vacation time ☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

Which of the above stays in your mind as the most important?

(check one) ☐ A. ☐ B. ☐ C. ☐ D. ☐ E. ☐ F. ☐ G. ☐ H. ☐ I.

Second most important?

(check one) ☐ A. ☐ B. ☐ C. ☐ D. ☐ E. ☐ F. ☐ G. ☐ H. ☐ I.

39. What was your net profit last year?

\$

40. What is your tolerance for risk on investments? ☐ High ☐ Medium ☐ Low ☐ Very Low

Date

Company/Business Name

Acire Financial Services (Acire Dynasty, LLC)

478-268-3090 sales@aciredynasty.com

New Client Get Acquainted Questionnaire

(for business owners only)

CONTINUE

Signature

Acire Financial Services (Acire Dynasty, LLC)

478-268-3090 sales@aciredynasty.com