



New Client Information Form

Bradford Bookkeeping Inc

Thank you for choosing Bradford Bookkeeping! Please complete this form to help us get started with your bookkeeping services.

Contact Information

Business Name: _____

Your Name: _____

Email Address: _____

Phone Number: _____

Preferred Contact Method:

- ☐ Email
- ☐ Phone
- ☐ Text

Basic Business Information

Business Structure:

- ☐ Sole Proprietor
- ☐ LLC
- ☐ S-Corp
- ☐ C-Corp
- ☐ Partnership

Do you currently use QuickBooks Online?

- ☐ Yes
- ☐ No

Number of Business Bank Accounts:



Number of Business Credit Cards:

Primary Payment Methods You Accept:

- ☐ Cash
 - ☐ Check
 - ☐ Credit/Debit Card
 - ☐ Venmo/Zelle
 - ☐ Other: _____
-

Main Goals

What are your primary goals for bookkeeping services? (check all that apply)

- ☐ Stay current with monthly books
- ☐ Catch up on past months
- ☐ Prepare for tax season
- ☐ Better understand my financials
- ☐ Track cash flow
- ☐ Reduce financial stress
- ☐ Other: _____

Are your books current?

- ☐ Yes
- ☐ No

If no, what month/year do you need to catch up from?

Additional Information

Do you have a CPA/Tax Preparer?

- ☐ Yes
- ☐ No

If yes, name and email: _____



Is there anything specific we should know about your business or bookkeeping needs?

Next Steps

1. Complete the Services Checklist (page 2)
2. Return both pages to mpues@bradfordbkg.com
3. Invite Bradford Bookkeeping to your QuickBooks Online account
4. We'll schedule a follow-up call to finalize onboarding

Bradford Bookkeeping Inc

Email: mpues@bradfordbkg.com | Website: bradfordbkg.com

Accurate Books. Better Decisions. Less Stress.



Services Checklist

Bradford Bookkeeping Inc

Client Name: _____

Please check all services you need or are interested in learning more about:

Core Bookkeeping Services

- ☐ **Monthly Bookkeeping & Reconciliation**
Regular transaction categorization and bank/credit card reconciliation
- ☐ **Catch-Up Bookkeeping**
Get your books current from past months or years
- ☐ **QuickBooks Online Setup**
Initial setup and chart of accounts configuration
- ☐ **QuickBooks Online Training**
Learn how to use QBO for your business needs

Financial Reporting & Analysis

- ☐ **Monthly Financial Reports**
Profit & Loss, Balance Sheet, and Cash Flow statements
- ☐ **Quarterly Financial Reports**
Comprehensive quarterly performance review
- ☐ **Custom Financial Dashboards**
Visual dashboards with key metrics and KPIs
- ☐ **Budget Creation & Tracking**
Develop budgets and track actual vs. projected performance

Accounts Payable & Receivable

- ☐ **Bill Pay Management**
Track and pay vendor bills through QuickBooks
- ☐ **Accounts Receivable Tracking**
Invoice creation and payment tracking (if applicable)
- ☐ **Vendor Management**
Organize vendor information and payment schedules



Payroll & Contractor Management

- ☐ **Payroll Processing**
Employee payroll management (requires separate payroll service)
- ☐ **Payroll Tax Filing**
Quarterly and annual payroll tax compliance
- ☐ **1099 Preparation & Filing**
Annual 1099-NEC forms for independent contractors
- ☐ **Contractor Payment Tracking**
Monitor payments to contractors throughout the year

Tax Support

- ☐ **Tax Preparation Support**
Organize books and reports for your CPA at tax time
- ☐ **Sales Tax Tracking & Filing**
Monitor sales tax obligations (if applicable)

Cash Management

- ☐ **Cash Receipt Tracking**
Daily/weekly cash collection recording and reconciliation
- ☐ **Cash Flow Analysis**
Monitor cash position and forecast future needs
- ☐ **Expense Categorization & Review**
Ensure proper tax deductions and expense tracking

Additional Services

- ☐ **Financial Dashboard Template (Purchase)**
Upgrade to using a customizable financial dashboard
- ☐ **Receipt Capture & Management**
Digital receipt organization (upgrade available)
- ☐ **Monthly Check-In Calls**
Regular calls to review financials and answer questions



☐ **CPA Coordination**

Direct communication with your tax preparer as needed

Priority Services

Which 3 services are most important to you right now?

Questions or Special Requests

Do you have any questions about our services or special requests?

Bradford Bookkeeping Inc

Email: mpues@bradfordbkg.com | Website: bradfordbkg.com

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