

Martin County Bookkeeping

CLIENT QUESTIONNAIRE

Company name and address: _____

Your name: _____

Phone Number: _____

Email Address: _____

In a few sentences, describe your business?

What type of entity is it? Sole-Prop, S-corp, LLC, Regular Corp, Partnership?

How many years have you been in business? _____

On average what are your monthly gross sales? _____

Are you currently using QuickBooks? If so, desktop or online? If not, what are you using?

If using QuickBooks, would you let me review the QB file? _____

Are your books up to date? If not, how current are they? _____

How many bank and/or credit card accounts are involved? _____

On average, how many transactions per month for all bank accounts and credit card accounts?

If you don't know, sample pdfs of all accounts for an average month would be helpful to see.

Do you have employees? How many employees? Do you outsource payroll? If so, with what company? _____

Do you have independent contractors? If so, how many? Will you want these done for you?

How do you prepare your invoices? And do you want these done for you? _____

How do you pay your bills? And do you want this done for you? _____

Do you report sales tax? If so, how often are you required to? And do you want this done for you? _____

Why are you changing Bookkeepers or why did your last bookkeeper leave?

When would you need me to start? _____