
Contact Information

Name _____ Email _____

Phone _____ Do you prefer to be contacted by phone or email? _____

Company Details

Company Name _____

Company Address _____

What is your website? _____

What is your job title? _____

Briefly describe what your company does: _____

When did your company start? _____

How many employees do you have? _____

Which type of entity is your company (LLC, S-Corp, C-Corp, Sole-Proprietor)? _____

Do you file federal taxes on a cash basis or accrual? _____

Who is your CPA and what firm are they with? _____

What bank is your main business account with? _____

Accounting Needs

What accounting software do you use? _____

What payroll software or company do you use? _____

How many check/debit transactions do you have each month? _____

Do you enter bills and payments or checks only? _____

Do you pay 1099 vendors? Yes No

How many invoices do you generate each month? _____

Do you accept credit cards? Yes No

Do you collect sales tax? Yes No

Do you track inventory in Quickbooks or other software? Yes No

How many bank accounts do you have? _____

How many credit cards do you have? _____

Have you worked with a bookkeeping service before? Yes No

What services are you looking for us to provide?

- Transaction Entry
- Client Billing
- Payroll
- Financial Statements
- Business Consulting
- Year End Tax Package
- Contract Management
- State Tax Reporting
- Cash Flow Reporting
- Business Start-Up Assistance
- Bill Pay
- Monthly Account Reconciliation
- City Tax Reporting
- Budgeting/Forecasting
- Other

What three areas do you want to improve in your accounting?

Are you happy with your current accounting solution?

Anything else we should know?
