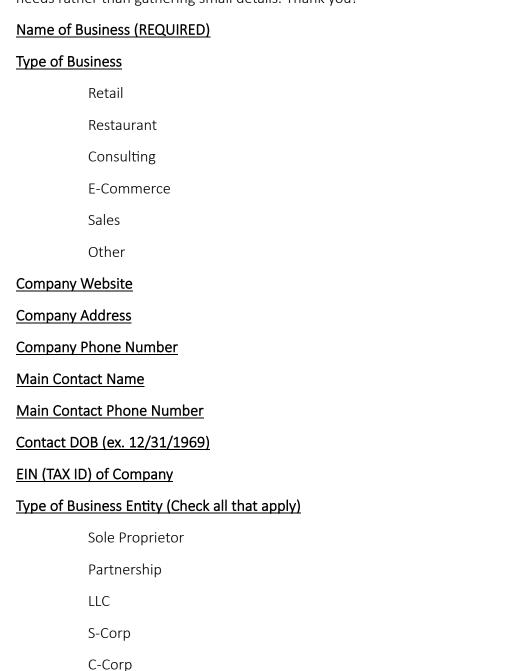


NEW BOOKKEEPING CONSULTATION INTAKE FORM

Please take a moment to complete this form. In doing so, we can spend more time discussing your bookkeeping needs rather than gathering small details. Thank you!



Non-Profit

Unsure

How many partners / owners?
How long has the company been in business
Number of Employees
Payroll Company (if no Employees, enter "NONE")
Bank Account Information (Check all that apply)
Business Checking
Institution
Business Savings
Institution
Credit Card(s)
Institution
Business Loans
Institution
PayPal
Venmo, Square, Etc. (Please list)
Current Bookkeeping Software (Check all that apply)
QuickBooks Online
QuickBooks Desktop
Xero
Peachtree
Other
No current software
Do you currently have a Bookkeeper?
Yes
No
If you currently have a Bookkeeper, why are you seeking a new one?
(You are not required to answer)

<u>Current CPA (Tax Preparer) contact information</u>

Status of Federal / State Business Tax Returns

Compliant

Not Compliant

Unsure

What is your favorite movie?

What areas do you want to improve with respect to your current accounting system?

How did you hear about us? (Check all that apply)

Search Engine

Yelp

QuickBooks ProAdvisor

Search Referral –

Other –