



Four Reasons, LLC

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PORTLAND, OR 97232
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NEW BUSINESS 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!

Name of Business (REQUIRED)

Type of Business

Retail

Restaurant

Consulting

E-Commerce

Sales

Other

Company Website

Company Address

Company Phone Number

Main Contact Name

Contact DOB (ex. 12/31/1969)

EIN (TAX ID) of Company

Type of Business Entity (Check all that apply)

Sole Proprietor

Partnership

LLC

S-Corp

C-Corp

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

Current CPA (Tax Preparer) contact information

Status of Federal / State Business Tax Returns

Compliant

Not Compliant

Unsure

What is your favorite movie?

What areas of concern do you have with respect to your business & what would you like to focus on during our meeting?

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

Search Engine

Yelp

QuickBooks ProAdvisor

Search Referral –

Other –