

Client Questionnaire

Use In Conjunction With A Service Agreement!

- **Business/Owner Name?**
- **Business Start Date?**
- **Business EIN Number or Owner's SS#?**
- **Business Structure?**
- **Business Year-End Cycle Date?**
- **Nature of Business:**
- **How many owners?**
- **How many times will owner(s) draw money?**
- **Accounting software being used?**
- **Are books and tax return up to date?**

- **How many of bank and credit cards are being used?**
- **Number of Employees?**
- **Average number of transactions per month?**
- **What type of reports you will need, per day, week, and month?**
- **Does the business collect and file sales tax?**
- **Present bookkeeping service or accountant?**
- **Future growth plans for the business?**
- **Other regulatory agencies requirements (i.e. lawyers, county, state, or federal)?**



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