

EEB Bookkeeping Client

- 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 the owner(s) draw money?
- Accounting software being used?
- Are books and tax return up to date?
- How many bank and/or credit cards are being used?
- Number of Employees, if Any?
- Average number of transactions per 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)?
- What type of reports will you need per day, week, and month?



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** This form will be used in conjunction with the agreed-upon service agreement **