

NEW CLIENT QUESTIONNAIRE

Thank you for your interest in our services. Our mission is to provide SUCCESS BUILDING business strategies and accurate outsourced management accounting services to small businesses and professionals. We want to make sure that you get the accounting firm that is the best fit for your needs, even if that fit is not with our firm. To that end, we have created this New Client Questionnaire so we can get a clear idea of where you are starting from on your business journey and where you would like to go.

We are interested in focusing on long-term business relationships with our clients and partnering with you on your journey to SUCCESS!

We are a QuickBooks Online Certified Pro Advisor, a Certified Public Bookkeeper, and we are an Accredited Tax Advisor with over thirty years diversified experience and we look forward to learning more about you and your business. Once you have filled out this New Client Questionnaire, we will be in touch with you in 2-3 business days.

Please complete all 25 questions that follow, Thank you for your assistance.

1 Your Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2 Your Business Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3 What Industry Are You In: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

4 Are You The Primary Decision Maker: Yes \_\_\_\_\_\_ No \_\_\_\_\_

4a If not, who is, and what is your role? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

5 Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

6 Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mailing Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

7 Your Business Entity Type:

 LLC \_\_\_

 S Corp \_\_\_

 Sole Proprietor \_\_\_

 C Corp \_\_\_

 Other, Explain \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

8 How many years have you been in Business? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

9 What size is your Business in number of people?

 \_\_\_ Just me, Owner/Operator

 \_\_\_ Partnership

 \_\_\_ 1-2 Employees

 \_\_\_ 3-15 Employees

 \_\_\_ more than 15 Employees

 \_\_\_ Other, Explain \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

10 What size is your business in Annual sales?

 \_\_\_ Brand New Startup-No sales yet

 \_\_\_ Under $100,000

 \_\_\_ Between $100,000 - $500,000

 \_\_\_ Between $500,000 - $1 million

 \_\_\_ Over $1 million in annual sales

11 Are you looking to grow? Yes \_\_\_\_ No \_\_\_

12 If yes, what is your target?

 Annual Sales \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Annual Revenue \_\_\_\_\_\_\_\_\_\_\_\_\_

13 Describe your business --- what do you do? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

13a Who do you serve? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

13b What do you charge? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

14 How “coachable” are you and are you open to change?

 1 2 3 4 5

Not Interested \_\_\_ \_\_\_ \_\_\_\_ \_\_\_\_ \_\_\_\_ Very Interested

15 What are your least favorite parts of being a business owner?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

16 How involved are you in your current bookkeeping process?

 \_\_\_ Very Involved

 \_\_\_ Moderately Involved

 \_\_\_ Would like to be more involved

 \_\_\_ Would like to be less involved

17 Are you a procrastinator? \_\_\_ Yes \_\_\_ No \_\_\_ Undecided

18 What, if any, software systems do you use?

 \_\_\_ QuickBooks Online

 \_\_\_ other QuickBooks

 \_\_\_ Another cloud bases system

 \_\_\_ other Desktop system

 \_\_\_ other, explain \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

19 Do you use PC or Mac Operating System? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

20 What kind of Accounting/Bookkeeping services are you looking for?

 Pick as many as you like:

 \_\_\_ Total outsourcing of Accounting/Bookkeeping function

 \_\_\_ Your involvement in cash in (income) and cash out (expenses)

 \_\_\_ regularly monthly maintenance---have us keep your books up to date

 On a regular monthly schedule

 \_\_\_ Controllership---temporary or part-time

 \_\_\_ Payroll service---full sevice

 \_\_\_ Budget service

 \_\_\_ other, please explain \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

21 How urgent is your timeline need?

 My Books are 1 2 3 4 5 My Books are

 Relatively up \_\_\_ \_\_\_ \_\_\_ \_\_\_ \_\_\_ Unorganized and up to date not up to date—Help!

22 Have you worked with an Accountant/Bookkeeper before?

 \_\_\_\_\_ Yes

 \_\_\_\_\_ No

22a If Yes, what was your experience like---feel free to give both positive and negative responses \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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23 Who prepares your taxes and when was the last time they were filed?

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24 How did you hear about Accurate Books and Tax?

 \_\_\_ Website

 \_\_\_ Web Search

 \_\_\_ Personal Referral

 \_\_\_ QuickBooks Pro Advisory Directory

 \_\_\_ other, please explain \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

24a If a Personal Referral, who should we thank? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

24b If you found us by a web search, what key words did you use in your search that led you to Accurate Books and Tax? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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25 Is there anything else you would like to add concerning what you are looking for in your search for an Accounting/Bookkeeping Firm? Also, you may add any questions, comments, and feedback.

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