



## Pre-Consult Questionnaire

Thank you for your interest in our complimentary consultation! We understand time is valuable and it will only take 10 minutes. This form will help us better understand your business needs before scheduling a consult to discuss the potential of a working relationship.

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Full Name: \_\_\_\_\_

E-mail: \_\_\_\_\_

Telephone: \_\_\_\_\_

Best time to reach you: \_\_\_\_\_

Your Time Zone: \_\_\_\_\_

Your Zip Code: \_\_\_\_\_

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1. Why are you feeling you are ready now for a change (or want to switch from you current service provider)?

2. What is your current "pain" i.e. business problem? Have you tried to resolve it? If so, how?

3. What is your goal in regard to your needs? (Account/Bookkeeping/Taxes/Financial Consulting)

4. What do you hope to get out of our appointment?

5. What would it feel like to get your accounting issues resolved?



## About your company

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Your Company Name: \_\_\_\_\_

Website: \_\_\_\_\_

Type of Business (entity type)?  Sole Prop.  Partnership  C Corp.  S Corp.  LLC  LLP

How long have you been in business?  Less than 12 months  1-2 Years  2-3 Years  4+ Years

What is your industry? \_\_\_\_\_

Do you collect sales tax?  Yes  No

Do you track inventory?  Yes  No If yes, how many inventory items do you currently have? \_\_\_\_\_

Do you currently have a point of sales system or a separate customer billing software?

Yes  No If yes, which software do you currently use? \_\_\_\_\_

What accounting software do you currently use? \_\_\_\_\_

What is the last month of all accounts reconciled in your current accounting system? \_\_\_\_\_

How many of the following accounts for business use do you currently have?

- Checking \_\_\_\_\_
- Credit cards \_\_\_\_\_
- Merchant \_\_\_\_\_
- Loans \_\_\_\_\_
- Savings \_\_\_\_\_

What are you gross annual revenues?

0 – 100,000  100,000 – 200,000  200,000 – 350,000  350,000 – 500,000  
 500,000 – 750,000  750,000 – 1,000,000  1,000,000 and above

Are you profitable?  Yes  No

On average how many monthly invoices do you have? \_\_\_\_\_

On average how many checks a month do you write? \_\_\_\_\_

Do you have employees?  Yes  No If so, how many? \_\_\_\_\_ Payroll system? \_\_\_\_\_

Are your tax returns current?  Yes  No If no, what is the last year taxes were filed? \_\_\_\_\_

How did you hear about us?