

## Client Preliminary Questionnaire

Please help us get to know your needs better.  
Fill out this form to the best of your knowledge.

Business Name: \_\_\_\_\_ Owner's Name: \_\_\_\_\_

Type of Business: \_\_\_\_\_ Product/Service: \_\_\_\_\_

Business Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Home/Office Phone: \_\_\_\_\_ Cell: \_\_\_\_\_ E-mail: \_\_\_\_\_

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

Date of Business Formation: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Date Started: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

EIN: \_\_\_\_\_ Entity Type: \_\_\_\_\_ If other, please describe: \_\_\_\_\_

Describe your business in the space below:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Year Founded: \_\_\_\_\_ Years of Management Experience: \_\_\_\_\_

How many employees do you have? \_\_\_\_\_ Are any part time? If yes, please list #: \_\_\_\_\_

Annual Sales/Revenue: \_\_\_\_\_ Annual Payroll: \_\_\_\_\_

Date Bank Account 1st Opened: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Date Started: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

How do you keep the Books now? ☐ In-house Bookkeeper ☐ Use any accounting software

Have you ever owned any other businesses in the past? ☐ Yes ☐ No

Do you have a business other than this one? ☐ Yes ☐ No

Number of Bank Accounts \_\_\_\_\_

Number of Transactions per Bank Account \_\_\_\_ Checks \_\_\_\_ Debit Card \_\_\_\_ Cash Withdrawals

Do you use personal credit card or personal funds for business expenses? \_\_\_\_\_

How many locations? \_\_\_\_\_ How many decision makers? \_\_\_\_\_ Number of Employees \_\_\_\_\_

Location of Business Records \_\_\_\_\_

Do you hold interest in any other business/operations? If so, please describe below:

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What states does your business operate in? Please list all of them on the line below:

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Did you face any losses/claims within the last 5 years? If so, please describe below:

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**On a scale of 1-5, with 1 being poor and 5 being great please answer the following question.**

How technologically oriented are you in the following?

- QuickBooks \_\_\_\_
- Internet in General \_\_\_\_
- Remote Access (logmein, etc.) \_\_\_\_
- Research (Google, etc.) \_\_\_\_

What is your Outlook on the Business? Please circle (Positive, Hopeful, Excited, etc.)

Other (please explain): \_\_\_\_\_

What are your sales? \_\_\_\_\_ Is your business profitable? \_\_\_\_\_

How much money per month do you need to meet all of your business expenses? \$ \_\_\_\_\_

Do you have Goals/Projections (Sales, Growth, etc.)? Please explain: \_\_\_\_\_

Are you looking to stabilize your business or streamline operations?

Are you looking to grow your business? (How?)(Plans?)(Strategies?)

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