



Client Name:	
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New client pre-sign up questions

1. Describe your business in a few sentences:
2. What type of entity is your business? (LLC, S-Corp, etc.)
3. How many years have you ran this business?
4. What are your monthly gross sales? (On Average)
5. How many employees do you have? Are any of these contractors? If so, how many?
6. Do you outsource payroll?
7. How many bank and/or credit card accounts do you have?
8. On average, how many transactions per month do you have? (Both bank and credit card accounts)
9. Are your tax returns current? When was the last time you filed taxes?
10. How do you prepare your invoices? Do you want these done for you?
11. How do you pay your bills? Do you want this done for you?
12. Do you have inventory?
13. Do you report sales tax?

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How often will you require this service?

- _____ Weekly
- _____ Monthly
- _____ Quarterly
- _____ Annually
- _____ One time
- _____ I'm not sure

How soon will the project begin?

- _____ ASAP
- _____ Within the next week
- _____ Within the next 2 weeks
- _____ Within the next month
- _____ Within the next 2-3 months