



Financial Services, Inc.

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Bookkeeping Services Intake Form

Client Information:

Name: _____

Address: _____

Phone: _____ Email: _____

What does your business/product do? _____

Company Information:

Business or Organization Name: _____

Address: _____

What does your business/product do? _____

Entity Type (sole proprietorship, LLC, S-Corp, etc): _____

Please roughly indicate the number of employees you have: _____

Bookkeeping Information:

Do you have prior experience with a bookkeeping firm? ____ yes ____ No

If so, who is your current CPA Provider? _____

Bookkeeping software your businesses uses now: _____

Payroll software your Business uses: _____

How many transactions do you process monthly? _____

Approximate volume of invoices per Month?: _____

Approximate volume of vendor payments per month: _____

Does your business have 1099 vendors? _____

Do you enter payments and bills?: _____

Do you use services like Paypal?: _____

How many bank accounts does your business have?: _____

How many credit cards does your business have?: _____

Your company's main bank: _____

Please choose the service(s) you require from our firm:

_____ Billing

_____ Billing payments

_____ Inventory Management

_____ Startup Account Setup

_____ Tax planning & advisory

_____ Tax reporting

_____ Monthly account reconciliations

_____ Cash flow reporting

_____ Budgeting and forecasting

_____ Year-end accounting preparation

_____ Business Consulting

_____ other: _____

Additional information about accounting services needs we should know:
