



## Certified Accounting and Tax Advisors

### Prospective Client Questionnaire for Businesses

Please complete this questionnaire and email to [rverma@accttechcs.com](mailto:rverma@accttechcs.com)  
or Fax to **303 648 4338**

*As a small business owner, myself, I enjoy working with others to achieve a common goal of personal success. This information will remain confidential and will be used to see if you are a good fit for our firm. We want to provide the best customer service possible, while helping you achieve your financial goals. I hope to be able to work with you soon. – Renne Verma*

Business Name: \_\_\_\_\_

Federal ID: \_\_\_\_\_ State ID: \_\_\_\_\_

Year-End Date: \_\_\_\_\_ Date Incorporated: \_\_\_\_\_

What type of business is it? C Corp / S Corp / Multi Member LLC / Single Member LLC / Sole proprietor

What Service does your business provide: \_\_\_\_\_?

*\*Please be prepared to provide copies of the previous two (2) years of tax returns and Depreciation Schedule, if applicable*

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Business Phone: \_\_\_\_\_ Personal Phone: \_\_\_\_\_

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

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





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Would you like to receive Premier CPA Services newsletter of tax tips? Yes / No

Main contact for business: \_\_\_\_\_ Phone: \_\_\_\_\_

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

Please list the names of all Shareholders/officers/members/owners:

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

Who is the primary contact for accounting information?

\_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Preferred method of contact: \_\_\_\_\_

What type of accounting software do you use (version, year) \_\_\_\_\_?

Do you produce monthly/quarterly financial statements? \_\_\_\_\_

Latest tax year filed with IRS? \_\_\_\_\_

Are you behind on any tax filings or payments? Yes / No

Have you ever been audited by any government agencies? Yes / No

If yes, please provide explanation:

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

Are you involved in any lawsuits with your business? Yes / No





## ***Certified Accounting and Tax Advisors***

Have you filed Bankruptcy? Yes / No

Are you currently using a CPA firm? Yes / No

If yes, why are you leaving your current CPA?

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How did you hear about our firm? Please be specific

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What is your goal for our firm & your business to achieve together?

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How frequently would you like to be in contact with your CPA? \_\_\_\_\_

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What are your expectations from your CPA?

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What type of help do you need (Circle all that apply)

Tax/ Accounting / Payroll / Sales Tax / other





## ***Certified Accounting and Tax Advisors***

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### **Payroll Information:**

How many employees do you have? \_\_\_\_\_

How often do your employees get paid? \_\_\_\_\_

How many subcontractors do you have? \_\_\_\_\_

### **Bookkeeping:**

How many Checking accounts do you have? \_\_\_\_\_

Approximate number of transactions do you have per month? \_\_\_\_\_

Do you use your business checking account to pay personal expenses? Yes / No

### **Sales Tax**

Filing Frequency: \_\_\_\_\_

POS/ Accounting System: \_\_\_\_\_

Multiple States? Yes / No

Is there any other information we should know that could help us serve your accounting needs?

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

