

Date: _____

Prospective Client Questionnaire

What type of service(s) do you need?

☐ Personal Tax Filing Status: ☐ Single ☐ Married ☐ Head of Household

☐ Corporate Tax Do you also need? ☐ Payroll ☐ Tangible

☐ Other Tax Services Estate?, Trust?, Gift? _____

☐ Other Services Needed _____

Business Name (if applies) _____

EIN _____

Taxpayer's Name _____

Spouse's Name (if applicable) _____

Taxpayer date of birth _____ Spouse date of birth _____

(required for e-filing tax return)

Taxpayer SSN _____ Spouse SSN _____

E-mail Address _____

Cell # _____ Home # _____ Fax # _____

Address _____

City/State/Zip _____

Would you like to receive our monthly e-newsletter? ☐ Yes ☐ No

What is your:

Occupation and/or Business Type _____

How did you hear about us?

☐ Sign ☐ Internet ☐ Referral Who _____ ☐ Other _____

Do you currently have a Tax and/or Accounting Professional?

☐ No ☐ Yes Name and/or Reason why considering change _____

If you are a Business:

☐ New Business ☐ Existing Business - Years In Business _____

How do you prepare your accounting currently?

☐ Manually ☐ QuickBooks Version (Year) _____ ☐ Excel

☐ No current Accounting System ☐ Other Software Name _____

Information for Prospective Clients

For our new clients we offer a brief consultation of ¼ of an hour free of charge. During the consultation we can better determine a range of time we believe would be sufficient to prepare the return and/or services based upon your personal circumstances.

Our fees will be based upon the amount of time it takes to prepare the return and/or the type of service necessary. The average billing rate is \$250 per hour. We do require a retainer for all new corporate clients and may need a retainer for new personal clients depending on the work required.

We may need your prior year's tax return(s), current accounting records (QB file, spreadsheet, etc.), and any other pertinent records to provide an accurate estimate of our projected fees.