

Mountain Bookkeeping & Tax Solutions

Initial Client Questionnaire for Accounting Services

Business Information:

Business Name:

Business Structure (LLC, Corporation, Sole Proprietorship, etc.):

Industry/Type of Business:

Business Start Date:

Federal EIN (if applicable):

Number of Employees:

Contact Information:

Primary Contact Name:

Phone Number:

Email Address:

Business Address:

Current Accounting Status:

Are you currently using any accounting software? If yes, which one?

QuickBooks

Xero

Other: _____

None

How are you currently maintaining your books?

In-house bookkeeper

External bookkeeper

Self-managed

Not currently maintaining books

How often do you need financial reports?

Monthly

Quarterly

Annually

Other: _____

Services Needed (Check all that apply):

Bookkeeping

Payroll Services

Tax Preparation

Financial Advisory

Business Tax Returns

New Business Setup

Short-term Rental Bookkeeping

Software Training

Other: _____

Financial Information:

- 14. Approximate monthly revenue:
- 15. Number of monthly transactions:
- 16. Number of bank accounts:
- 17. Number of credit cards:
- 18. Do you have any loans or lines of credit to track?

Tax Information:

- 19. Last filed tax return year:
- 20. Are your taxes current?
- 21. Do you make estimated tax payments?
- 22. Do you have any unfiled tax returns?

Additional Questions:

- 23. What are your biggest accounting/bookkeeping challenges?
- 24. What is your preferred frequency for accounting updates?
- 25. Do you need catch-up bookkeeping services?
- 26. Are you interested in accounting software training?

Timeline:

- 27. When would you like services to begin?
- 28. Are there any immediate deadlines or concerns?

Budget:

- 29. What is your monthly budget for accounting services?

Additional Notes or Concerns:

Thank you for completing this questionnaire. We will review your information and contact you within 24 hours to discuss our services and how we can best meet your needs.

Mountain Bookkeeping & Tax Solutions

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