SEACOAST ACCOUNTABILITY
ACCOUNTING. BOOKKEEPING. TAX SERVICES.

QB Consulting Client Intake Form

Business Type: ____________________ **Specific Category** ______________________________

1099 Help __________ Assisted Payroll ________

Initial Consultation:		Referred by:
First Visit:		Thank you sent:
NL Y N Completed	HC Y N Completed	BC Y N Completed

Business Name			
Address			
City	**State**	**Zip**	
Contact Person, Position:		**Date of Birth:**	
Spouse:		**Interests/Hobbies:**	
Business Phone:		**Cell:**	
Business Fax:		**E-mail:**	
Preferred Method of Contact:		**Best Time to Reach:**	
What is the nature of the business?			
Federal Id #:	**# of years in business:**		
Number of Employees:	**Annual Revenues:**		

Sole Proprietorship		**Corporation**		**S-Corp**		**LLC**	
Partnership		**Non Profit**		**LLP**		**Individual**	

Name(s) of owner(s), partner(s),or proprietor(s):

Name:		Title:	%ownership?:
Address:	City	State	Zip
Phone:	Fax:		Email:
Name:		Title:	%ownership?:
Address:	City	State	Zip
Phone:	Fax:		Email:

Name of CPA/Tax Accountant:

Name:			
Address:	City	State	Zip
Phone:	Fax:		Email:

Payment Information	
EFT Authorization Date:	Online Bill Payment:
Routing Number	Client Set Up Date:
Account Number	Verification Date:
Transfer Date	First Payment Date
Amount	Amount
Payment Frequency	Payment Frequency
Accounting Budget per month:	**Estimate of Services:**

QB Consulting Client Intake Form

Do you currently use QuickBooks?
If so, what version and year?
How many vendors do you record bills for?
How many customers do you inovice?
Do you have inventory?
Do you have payroll?
Do you need help setting up your chart of accounts?
Do you have a home office?
Do you use online banking?
Do you have a PayPal account?
Do you create estimates?
Do you progress invoice?
Do you take deposits from customers?
Do you charge late fees to customers?
Do you create monthly statements?
Do you charge sales tax, or meals tax?
Do you prepare a budget?
Do you have more than one location, or product line?
Do you bill expenses to customers?
Do you job cost?
Do you track time?
Do you get discounts from vendors?
Is cash flow an issue?
Do you track vehicle mileage?
Do you understand how to use a balance sheet?
Do you have subcontractors that will require a 1099?
Do you need single user or multiuser modes?