



CLIENT INFORMATION FORM

Contact Information

Legal Name of Company (for sole proprietors, this is the owner's name)

Trade Name of Company (doing business as)

Billing Address

Address: _____

City/St/Zip: _____

Phone: _____ Fax: _____

Physical Address (if different)

Address: _____

City/St/Zip: _____

Phone: _____ Fax: _____

Contacts: (Use Back of Form if Necessary)

Accounting/Bookkeeping Contact at Company _____

Position/Title: _____

Direct Line/Ext.: _____

Cell: _____ Email: _____

Other Contact: _____ Direct Line/Ext _____

Position/Title: _____

Cell: _____ Email: _____

Company Information

Tax Type: C-Corp S-Corp LLC Partnership Schedule C 501(c)3

If LLC, how are you taxed? _____

Owner Information:

Owner 1: _____ % Ownership _____

Owner 2: _____ % Ownership _____

Owner 3: _____ % Ownership _____

Previous Consulting

Who is your CPA or who prepared your most recent income tax return? (Please provide the name of the organization, your contact, and phone number.)

Are you currently a client of this tax preparer? Yes No

Who does your bookkeeping (employee or outside sources)?

Data File Setup Information

On what date do you want to begin using QuickBooks? (if not sure, we can decide this together)

Do you already own the appropriate number of licensed copies of QuickBooks? Yes No

If yes, which version and edition of QuickBooks do you own? _____

If yes, how many licenses of QuickBooks do you have? _____

QuickBooks Licenses, Users and Networking

How many people in your company will use QuickBooks?

How many computers will run QuickBooks?

Will you host the QuickBooks data on a dedicated server?

Payroll Preparation

Skip this section if you do not have any employees, including the owner.

How many employees do you have? _____

Circle one in each question below

Do you need to track overtime wages for your employees? Yes No

Do you need to track worker's compensation costs by job or department (class)? Yes No

Do you have a dedicated checking account for payroll? Yes No

Do you need to track your employees' time in your accounting system? Yes No

Note: *Time tracking in QuickBooks is required if you want to track labor costs by job or department (class). It is also necessary if you invoice your customers/clients based on how many hours your employees work on a job.*

How do you currently process your payroll? (Check One)

I prepare payroll myself by hand – no software

I prepare payroll myself using QuickBooks

I prepare payroll myself using software other than QuickBooks

(Please Specify) _____

I outsource my payroll to a payroll service

(Please Specify) _____

Miscellaneous

Do you collect sales tax?

Do you maintain an inventory?

Do you have a separate checking account strictly for your business?

Do you use any credit cards for business purchases?

What is your industry? _____

Describe in detail what your business does:

Needs/Goals

What are your bookkeeping and or QuickBooks needs? What do you hope to accomplish with my services?