

Rate: \_\_\_\_\_

Mileage: \_\_\_\_\_

## CLIENT INFORMATION FORM



Date: \_\_\_\_\_

Source/Referred by: \_\_\_\_\_

\_\_\_\_\_

### 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: \_\_\_\_\_

## TAX ID NUMBERS

Do you have an EIN? (this is a 9 digit number that was assigned to you by the IRS if you or your accountant applied for it)      **YES** \_\_\_ **EIN Number:** \_\_\_\_\_ **NO** \_\_\_\_\_

Do you have a Missouri ID#? (you would have this if you have sales tax or payroll)

**YES** \_\_\_ **Number:** \_\_\_\_\_ **NO** \_\_\_

## 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 \_\_\_\_\_

**Business Start Date:** \_\_\_\_\_

**Quickbooks Start Date:** \_\_\_\_\_

## 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?