



PO Box 1018, Blue Ridge, GA 30513

706-632-7850

[www.Premiercpaservices.com](http://www.Premiercpaservices.com)

## Prospective Client Questionnaire for Businesses

Please complete this questionnaire and email to [Melinda@premiercpaservices.com](mailto:Melinda@premiercpaservices.com) or Fax to 706-632-3925

*As a small business owner myself, I enjoy working with others to achieve a common goal of personal success. This information will remain confidential and will be used to see if you are a good fit for our firm. We want to provide the best customer service possible, while helping you achieve your financial goals. I hope to be able to work with you soon. – Jackie Self CPA*

Business Name: \_\_\_\_\_

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

What type of business is it? C Corp / S Corp / Multi Member LLC / Single Member LLC / Sole proprietor

What Service does your business provide: \_\_\_\_\_?

*\*Please be prepared to provide copies of the previous two (2) years of tax returns and Depreciation Schedule, if applicable*

Business Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Business Phone: \_\_\_\_\_ Personal Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Website: \_\_\_\_\_

Would you like to receive Premier CPA Services newsletter of tax tips? Yes / No



Main contact for business: \_\_\_\_\_ Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Please list the names of all Shareholders/officers/members/owners:

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Latest tax year filed with IRS? \_\_\_\_\_

Are you behind on any tax filings or payments? Yes / No

Have you ever been audited by any government agencies? Yes / No

If yes, please provide explanation:

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Are you involved in any lawsuits with your business? Yes / No

Have you filed Bankruptcy? Yes / No

Are you currently using a CPA firm? Yes / No

If yes, why are you leaving your current CPA?

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How did you hear about our firm? Please be specific

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What is your goal for our firm & your business to achieve together?

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What type of help do you need (Circle all that apply)

Tax/ Accounting / Payroll / Sales Tax / other

**Payroll Information:**

How many employees do you have? \_\_\_\_\_

How often do your employees get paid? \_\_\_\_\_

How many subcontractors do you have? \_\_\_\_\_

**Bookkeeping:**

How many Checking accounts do you have? \_\_\_\_\_

Approximate number of transactions do you have per month? \_\_\_\_\_

Do you use your business checking account to pay personal expenses? Yes / No

**Sales Tax**

Filing Frequency: \_\_\_\_\_

POS/ Accounting System: \_\_\_\_\_

Multiple States? Yes / No

Is there any other information we should know that could help us serve your accounting needs?

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