



PO Box 1018, Blue Ridge, GA 30513
706-632-7850 | www.PremierCPAServices.com

Prospective Client Questionnaire for Business

Please complete this questionnaire and email it to kimberly@premiercpaservices.com or Fax it 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?

What product/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: _____

Business Phone: _____ Personal Phone: _____

Email: _____

Website: _____

Would you like to receive the Premier CPA Services e-Newsletter of tax tips?



Main contact for business: _____ Phone: _____

Email: _____

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

Latest tax year filed with IRS? _____

Are you behind on any tax filings or payments?

Have you ever been audited by any government agencies?

If yes, please provide explanation:

Are you involved in any lawsuits with your business?

Have you filed Bankruptcy?

Are you currently using another CPA firm?

What is the subject of your request for appointment?

How did you hear about our firm? (please be specific)

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



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

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 per month? _____

Do you use your business checking account to pay personal expenses?

Sales Tax

Filing frequency: _____

POS / Accounting System: _____

Multiple states?

If so, which states? _____

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

