

Company name: \_\_\_\_\_

Contact person: \_\_\_\_\_

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

Phone number: \_\_\_\_\_

Address: \_\_\_\_\_

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

**Business Entity Type**

- Corporation
- Partnership
- LLC
- Sole Proprietor
- Other \_\_\_\_\_

**Estimated Revenue**

- < \$1M
- \$1 - \$5M
- > \$5M

**Number of Employees:** \_\_\_\_\_

**What type of tax return do you currently file with the IRS?**

- 990
- 1040
- 1065
- 1120
- 1120S

**Which type of taxes do you currently pay, select all that apply?**

- Payroll taxes
- Sales tax
- Excise taxes
- Other \_\_\_\_\_

**What type of financial statements do you require for your entity?**

- Audited
- Compiled
- Reviewed

**Who requires your audited or reviewed financial statements?**

- A bank
- The State
- Authority - please specify: \_\_\_\_\_
- Other \_\_\_\_\_

**What type of accounting software do you use?**

- QuickBooks Online
- QuickBooks Desktop
- Other \_\_\_\_\_

**What types of services does your current accounting firm provide?**

- Tax preparation
- Tax planning and projections
- Monthly or quarterly visits
- Financial statement preparation
- Bookkeeping
- Other \_\_\_\_\_

**Do you or your business maintain a retirement plan? If yes, is it a:**

- Defined Benefit/Cash Balance Plan
- 401(k)/Profit Sharing Plan
- Simplified Employee Pension
- Other \_\_\_\_\_

**Is there a specific reason that prompted your search for a new CPA firm?**

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