



GET ACQUAINTED QUESTIONNAIRE

Name: _____

Business Entity: _____

Business Entity Type: _____

E-mail: _____

Phone #: _____ Fax: _____ Cell: _____

Address: _____

City, State, Zip: _____

Best means of communication: Email Phone Either Other: _____

Point of Contact or Key Personnel:

Name: _____ Position: _____ Email: _____

Name: _____ Position: _____ Email: _____

Name: _____ Position: _____ Email: _____

Business Start date: _____ Year End: _____

Number of years in business: _____

Do you currently have a website? If so, what is the URL? _____

Time Zone: _____

Currently have a tax accountant: YES NO

If no, is one needed? YES NO

Type of tax return filed: _____

Last tax return filed: _____

Are your records currently keep manually or electronically?: Manual Electronic

If yes, name of software used: _____

Empowering you to thrive financially in life and business.

Phone: 888.851.6130

www.Empower2Thrive.com

Fax: 586.349.6850

Are you open to online software solutions? Why or why not.

How many clients do you have? _____

What was your gross revenues last year? _____

Approximately, how many transactions do you process per month? _____

Briefly describe your company and the products or services you provide.

Do you process payroll in-house or do you outsource it? In-House Outsource

If you outsource, who is the provider? _____

Do you also have contractors to whom you issue Form 1099's? YES NO

Do you maintain inventory? YES NO

What method do you use? FIFO LIFO Average Cost

What aspects of your business are the biggest challenges? What would be your ultimate goal?

Bookkeeping: _____

Tax planning: _____

Job Costing: _____

Software training/installation: _____

Life insurance: _____

Retirement Planning: _____



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Other: _____

List 3-5 goals over the next 12 months.

Have you previously worked with another accountant? What services did they provide? Why did you stop working with them?

What is your ultimate goal from working with Empower 2 Thrive?

How did you hear about Sherrell T Martin and Empower 2 Thrive, LLC?

What else would you like me to know? _____

Please sign me up for your Empowering You bi-weekly e-zine.