



Providing us the following information will help us design a professional bookkeeping package proposal for you.

It's a fill-in form, so simply type your answers and send it back!

What type of entity is your business? [] Other _____
[] Corporation [] S Corporation [] LLC # of members ___ [] Sole Proprietor [] Partnership

Type of bank-related accounts your business has, and how many transactions a month in each:

Checking # of Accounts Avg # of transactions each month
Savings # of Accounts Avg # of transactions each month
Money Market # of Accounts Avg # of transactions each month
Credit Card # of Accounts Avg # of transactions each month
Loan # of Accounts

What are the most important areas you need help with? Check all that apply.

- [] I don't have enough time to keep track of my finances myself
[] I don't understand what to do, or why, and don't have the time or desire to learn
[] Managing Invoices and related payments
[] Managing bill payments on time
[] Managing bill payments when cash is short
[] Understanding my financial information - what do the statements tell me
[] Budgeting and/or comparing budgets to actual results
[] Being ready for tax time - I hate extensions!
[] Other - Anything else you want us to know?

Compliance:

- [] File 1099s each January
[] File Delaware Gross Receipts Tax
[] Work with my tax preparer
[] Other -

Administrative related items (if you need help resolving problems):

- [] Work with my payroll service provider
[] Work with suppliers
[] Work with customers
[] Help with Government Agency Notices
[] Other -

Your name or business name: _____

Contact information: _____

FYI - while there may be times when it's the best option, we really don't like to quote an hourly rate. There are many reasons for this, and we'll be happy to explain. Thank you!