|  |  |
| --- | --- |
| Date: |  |
| Client ID: |  |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **PROSPECTIVE NEW CLIENT FORM** **(BUSINESS/TRUST/ESTATE/NON-PROFIT)** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Name of firm representative: | | | | | | Haley Bartholow | | | | | | | | | | | | | | | | | Email: | | | | haley@bowdentanner.com | | | | | | | |
| Name of entity representative: | | | | | | | | |  | | | | | | | | | | | | | | | | | | | Title: | |  | | | | |
| How did you hear about us? | | | | | | | | Ad  Drive/Walk By  Online  Referred by: | | | | | | | | | | | | | | | | | | | | |  | | | | | |
| Mailing address: | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| City: |  | | | | | | | | | | | | | | | | | | | State: | | | | | |  | | | | | | | Zip: |  |
| Preferred/primary phone number? | | | | | | | | | |  | | | | | | | | | | E-mail: | | | | | |  | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **QUESTIONNAIRE** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **1).** Have you used any of our services before? | | | | | | | | | | | | | | | | No  Yes | | | | | | | | | | | | | | | | | | |
| Specify: |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **2).** Entity legal name: | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **3).** Entity “DBA” name, if applicable: | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | |
| **4).** Entity type: | | Corporation  Partnership  Estate  Trust  Not for Profit  LLC | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| If corporation, which type? | | | | | S-Corp  C-Corp  Other/Unknown: | | | | | | | | | | | | | | | | | | | | |  | | | | | | | | |
| If corporation, how many shareholders? | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | |
| If partnership, how many partners? | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | |
| **5).** What is your main profession/product? | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | |
| **6).** What is your EIN/federal identification number? (If applicable) | | | | | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | |
| **7).** What year did you start your business/create entity? | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | |
| **8).** Are you current on your tax filings? | | | | | | | | | | | | | Yes  No | | | | | | | | If no, specify last tax year of filing: | | | | | | | | | | |  | | |
| **9).** Who prepared your most recent tax filing? | | | | | | | | | | | | | | | | | CPA  Tax Preparation Company  Self | | | | | | | | | | | | | | | | | |
| **10).** How do you record business income and expenses? | | | | | | | | | | | | | | | | | | | | QB Desktop  QB Online  Taxpayer Prepared Summaries | | | | | | | | | | | | | | |
| If Quickbooks, provide details: | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | |
| **11).** Who is currently responsible for bookkeeping? | | | | | | | | | | | | | | | | | | Self  Spouse  Employee  Other: | | | | | | | | | | | | |  | | | |
| **12).** Are you interested in our bookkeeping or payroll services? | | | | | | | | | | | | | | | | | | | | | | No  Yes, Bookkeeping  Yes, Payroll  Yes, Both | | | | | | | | | | | | |
| **13).** Do you have employees? | | | | | | | No  Yes | | | | | | | | | | If yes, how many? | | | | | | | |  | | | | | | | | | |
| If yes, how frequent is your payroll? | | | | | | | | | | | | Weekly  Bi-Weekly  Semi-Monthly  Monthly | | | | | | | | | | | | | | | | | | | | | | |

*Page 1 of 2*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | | | | | | |
| If yes, are you current on payroll taxes and filings? | | | | No  Yes | | |
| **14).** Do you have business loans? | Bank Loans  Credit Card Loans  Private Loans  SBA | | | | | |
| **15).** Approximately what were your gross sales for last year? | | | | | $ | |
| **16).** Approximately what were your total expenses for last year? | | | | | $ | |
| **17).** Approximately what was your net profit for last year? | | | | | $ | |
| **18).**  Do you anticipate a significant increase this year or next? | | | | | $ | |
| **19).**  Do you use a vehicle for this business? | | | No  Yes | | | |
| If yes, how do you track expenses? | |  | | | | |
| If yes, do you provide vehicles to employees or subcontractors? | | | | | No  Yes | |
| **20).** Do you have any tax components or specific concerns you would like to discuss further when we meet? | | | | | |  |
|  | | | | | | |
|  | | | | | | |
|  | | | | | | |

Bowden & Tanner, LLC will review the information provided in this form. Upon approval, a thirty to forty-five minute meet and greet may be scheduled at your request. Longer meetings including consultation time will be charged based on the firm’s standard consultation rate. ($195.00 per hour)

**We ask that you wait to schedule until you have all your documents. Bring all documents that apply.**

Documents to bring to the initial meet and greet may include the following:

|  |  |
| --- | --- |
| * **SS4 / EIN Letter from IRS** * **Certificate of Formation (TX)** * **Letter from State containing “XT” number (TX)** * **1120-S Election (Form 2553), if applicable** * **Company Agreement** * **Membership Roster** * **P&L Statement(s)** | * **Death Certificate** * **Letters of Testamentary** * **Legal estate/trust documentation** * **Prior year tax return, including depreciation schedules if applicable** * **All tax related forms** |

**We will be in touch with you soon. Thank you for your interest in our firm!**

*Page 2 of 2*