

Girl Friday Enterprises

BOOKKEEPING

Client Questionnaire

Your Name:

Company name:

Phone Number:

Email Address:

How long have you been in business:

Entity Type:

- S-Corp
- Partnership
- sole proprietorship
- C-Corp
- LLC

Description of product and/or services offered

Do you collect and pay sales tax? Yes No

Do you need payroll services? Yes No

If you need Payroll Services, How many employees?

How many business bank accounts do you have?

How many business credit cards do you have?

How many business loans do you have?

What's your monthly budget?

- \$150 - \$300
- \$300 - \$500
- \$500 - \$750
- \$1,000 or more

What services are you looking for?

Is your business account used to pay personal expenses?

Yes No

Is your personal account used to pay business expenses?

Yes No

Are your books current? Yes No

What software are you currently using?

- QuickBooks Desktop
- QuickBooks Online
- Xero
- Sage
- Excel
- Other

How involved do you want to be with the bookkeeping?

- Not At All. "That's why I hired a bookkeeper."
- Somewhat Involved - Quarterly or semi annual review
- More involved - Monthly review
- Very Involved - Weekly Review

Approximately how many transactions are there per month?

- 25-75
- 76-150
- 151-300
- 301-500
- 501-750
- 751-999
- 1,000+

How did you hear about us?

Girl Friday Enterprises

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Do you have any fixed assets?

Vehicle

Building

Home

Other:

What are your main problems that a bookkeeper could help with (i.e. bookkeeping is a nightmare, little to negative profit, too much debt, not paying yourself, not sure where your business stands financially)?

Do you collect sales tax?

Yes

No

Are you current on your sales tax filings?

Yes

No

Will you need us to file your sales tax?

Yes

No

Is there anything else you'd like us to know?