



Client Questionnaire

Please complete this form and return it to us via email or upload onto evergreenbusinessservicesllc.com so that we can better assess your bookkeeping, Clean-up, and setup needs. If necessary, attach more information about your specific needs that will help us better understand your business.

Personal Information

Name:

Address:

Phone Number:

Company Information

Name:

Address:

Phone Number:

1. Describe your business in a few sentences:
2. What type of entity is your business? (Sole Proprietor, LLC etc.)
3. What are your monthly gross sales?
4. How many years have you run this business?
5. How many employees do you have? Are any of these contractor(s)? If so, how many?
6. Do you outsource payroll?
7. How many bank and/or credit card accounts do you have?



8. On average, how many transactions per month do you have? (Both bank/credit card accounts?)
9. How do you prepare your invoices? Do you want these done for you?
10. How do you pay your bills? Do you want these done for you?
11. Do You have sales tax?
12. Do you have inventory?
13. What accounting software do you use?

Book Keeping Clean-Up Questions

1. How far back do you need your books to be cleaned up?
2. When was the last bank reconciliation?
3. What is the deadline to get your books cleaned up?
4. Is last year's tax return completed? If not, when do you plan to file?

Please provide any additional information or concerns you may have regarding your business: