

## Client Discovery Questionnaire

### Contact Information

Name:

Business Name (if applicable):

Email Address:

Phone Number:

Preferred Method of Contact:

### Business Background

How long has your business been in operation?

What type of entity is your business? (LLC, S-Corp, etc.):

What industry does your business operate in?

Describe your business in a few sentences:

### Financial Information

What is your approximate annual revenue?

Do you have any outstanding loans or debts?

How many employees do you have?

### Bookkeeping Needs

Are you currently using any bookkeeping software? If yes, which one?

What are your primary bookkeeping needs? (e.g., monthly reconciliations, financial reporting, etc.)?

Do you have any specific bookkeeping challenges or pain points?

## Client Discovery Questionnaire

continued

### Goals and Expectations

What specific goals would you like to achieve with our bookkeeping service?

What are your expectations from a bookkeeping service?

### Timeline and Availability

How soon do you need assistance with your bookkeeping?

Are there any specific deadlines or time constraints we should be aware of?

### Additional Information

Is there any other information you think we should know before our initial discovery call?

Do you have any questions or concerns for us?

### How did you hear about us?

- ☐ Social media
- ☐ Online search
- ☐ Referral, please specify:
- ☐ Other, please specify:

### Consent for Contact

By submitting this form, you consent to us contacting you regarding your bookkeeping needs.

Signature

Date