**New Bookkeeping & Payroll Client Intake Form**

Business Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Business Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Business Contact Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Business Contact Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Business Website: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Primary Business Activity/Type: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of Incorporation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Tax ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Calendar/Fiscal Year: \_\_\_\_\_\_\_\_\_\_\_\_ If Fiscal, what is year-end? \_\_\_\_\_\_\_\_\_\_\_\_

Gross Yearly Revenue: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Number of Employees: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other Business Names: (Please Separate by a semi-colon if more than one)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Owner Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Owner Contact Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Preferred Method of Contact**: \_\_\_\_Phone \_\_\_\_\_Email

Billing and Invoice: \_\_\_\_\_Mail \_\_\_\_\_\_Email

Have you ever had a Professional Bookkeeper? \_\_\_\_

List two reason for hiring a bookkeeper:

**Indicate types of Services Needed:**

**Bookkeeping Services:** \_\_\_\_\_\_ Monthly \_\_\_\_\_\_Quarterly \_\_\_\_\_\_\_\_\_Annual \_\_\_\_\_\_\_\_Per Diem

**Payroll Services:** \_\_\_\_\_Weekly \_\_\_\_\_\_\_Biweekly \_\_\_\_\_\_Monthly \_\_\_\_\_\_Quarterly \_\_\_Annually

**Quickbooks and Xero Consulting:** \_\_\_\_Monthly \_\_\_\_\_Quarterly \_\_\_\_\_\_\_Ad Hoc

**Initial company and software setup:** \_\_\_\_\_\_\_ **Reconciliations and account clean up**: \_\_\_\_\_\_\_\_