



ACCOUNTING AND BOOKKEEPING **CLIENT ONBOARDING QUESTIONNAIRE**

Welcome! We're excited to begin working with you. In order to ensure that we provide the best possible service, please take a few minutes to complete this questionnaire. Your responses will help us understand your business and financial needs, and allow us to tailor our services accordingly.

COMPANY INFORMATION:

- Company name:

- Company address:

- Company website (if applicable):

- Type of business entity (e.g., sole proprietorship, partnership, LLC, corporation):

- Date of incorporation/formation:

- Federal Tax ID number (EIN):

PRIMARY CONTACT INFORMATION:

- Name:

- Title/Position:

- Email:

- Phone number:

BUSINESS BACKGROUND:

- Briefly describe your business and its primary products/services:

- How many years have you been in business?

- How many employees do you currently have?

- What is your annual revenue (approximate)?

- Do you have any subsidiaries or affiliated entities? If yes, please provide details:

ACCOUNTING & BOOKKEEPING:

- What is your current accounting software/platform?

- Are you interested in transitioning to another accounting software? If yes, please specify:

- How often do you require financial statements (e.g., monthly, quarterly, annually)?

- Do you have any specific reporting requirements or needs?

- What is your fiscal year-end?

- Who is responsible for managing your company's accounting and bookkeeping tasks currently?

- Have you ever worked with an external accounting or bookkeeping firm before? If yes, please provide details:

TAX & COMPLIANCE:

- Do you require assistance with tax planning and filing? If yes, please indicate which tax returns need to be prepared (e.g., federal, state, local, sales tax, etc.):

- Have you had any tax audits or issues with tax authorities in the past? If yes, please provide details:

- Are you aware of any upcoming changes in tax laws that may impact your business? If yes, please provide details:

- Do you have any international tax concerns or obligations?

PAYROLL:

- Do you currently have a payroll system in place? If yes, please provide the name of the payroll service or software:

- How frequently do you process payroll (e.g., weekly, biweekly, monthly)?

- Do you require assistance with payroll tax filings and compliance?

FINANCIAL PLANNING & ANALYSIS:

- Are you interested in financial planning and analysis services, such as budgeting, forecasting, and cash flow management?

- Do you have any specific financial goals or objectives for your business?

- Are there any areas of your business where you would like to improve financial performance?

ADDITIONAL SERVICES & SUPPORT:

- Are you interested in any additional services, such as business consulting, merger and acquisition support, or succession planning?

- Do you have any specific accounting, bookkeeping, or financial concerns that you would like us to address?

- Are there any other areas where you feel our firm can provide value or support?

PREFERRED COMMUNICATION & FOLLOW-UP:

- How do you prefer to communicate with our team (e.g., email, phone, in-person, video conference)?

- How frequently would you like to receive updates or touch base with our team?

- Are there any specific deadlines or time-sensitive issues that we should be aware of?

- Thank you for taking the time to complete this questionnaire. We look forward to working with you and helping your business thrive. Once we have reviewed your responses, a member of our team will be in touch to discuss the next steps in the

onboarding process and address any questions or concerns you may have.

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- Please feel free to provide any additional information or comments below that you think would be helpful for us to know as we begin working together:
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ADDITIONAL COMMENTS OR INFORMATION:

By submitting this questionnaire, you confirm that the information provided is accurate to the best of your knowledge. Please note that any changes in your business circumstances or requirements should be communicated to us as soon as possible to ensure appropriate and timely service.

If you have any questions or need assistance completing this questionnaire, please don't hesitate to reach out to our team at sue@nezcraft.com or 941.544.0078. We're here to help and look forward to serving your accounting and bookkeeping needs.