

Early Harvest CPAs, LLC

Initial Consultation Checklist

Your goals for the meeting:

- 1) Gain information on services we offer:
 - a) Bookkeeping tasks
 - b) Financial Statement preparation
 - i. For management discussion
 - ii. For loan applications
 - c) Tax compliance
 - d) Payroll processing and tax filings
 - e) Training classes
- 2) Discuss specific issues or questions regarding your financial condition
- 3) Determine whether our services are value added to you and your business

How can we help you solve a problem?