



FAX FORM TO 855-678-4908

Contact Information

Name _____

Address _____

City _____ Zip _____

Email _____

Phone _____

Do you prefer to be contacted by phone or email? (circle one) Phone Email

Your company info

Company name _____

Website _____

Your title _____

Briefly describe your products and services _____

Number of employees _____

What year did you start your business? _____

Type of entity: (circle one) Sole Proprietor Partnership Corporation LLC LLP

Your Accounting Needs

What is the current software are you using? (circle one)

QuickBooks Pro QuickBooks Premier QuickBooks Online Xero Other

What is the current payroll solution you are using? (circle one)

QuickBooks Basic QuickBooks Enhanced QuickBooks Assisted Intuit Online Payroll
Paychex ADP Other

Approximately how many check and debit card transactions do you have each month? _____

Do you enter bills and bill payments or enter checks only? _____

Do you pay 1099 vendors? (circle one) Yes No If yes, approximately how many? _____

Approximately how many invoices do you generate each month? _____

Do you accept credit card payments? (circle one) Yes No

Do you collect sales tax? (circle one) Yes No

Do you use QuickBooks to track inventory? (circle one) Yes No

How many credit card accounts do you use? _____

Are you happy with your current accounting solution? _____

What three areas would you like to improve related to your accounting? _____

Thank you for completing this form. Your information is carefully reviewed so that we can determine the best way to serve you.

Please fax the completed form to (408) 852-4025 or send by email to cindy@beyondbalancedbooks.com

You will be contacted within 24 hours to schedule a complimentary session. We look forward to speaking with you and getting to know you better.