**CLIENT INTERVIEW FOR ACCOUNTING SOFTWARE PURPOSES**

Please fill out this form and return it to me via our client portal at www.guidantba.com.

**CLIENT COMPANY INFORMATION:**

Company Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City/St/Zip \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone (Business/personal) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Check one: Sole Prop \_\_\_\_\_ Partnership \_\_\_\_\_ C Corp \_\_\_\_\_ S Corp \_\_\_\_\_ LLC \_\_\_\_\_ LLP \_\_\_\_\_

Last Month of Tax Year (e.g., Dec): \_\_\_\_\_\_\_\_\_\_\_\_\_

Owner(s) Name(s)/ % of ownership

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_ %\_\_\_\_

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

EIN# \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State Tax ID # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What is your industry? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What is the company’s approximate annual revenue? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do you collect Sales Tax? If yes, for what state(s)? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do you intend to use QuickBooks to track inventory? Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, approximately how many Inventory Items do you stock? \_\_\_\_\_\_\_\_\_\_\_\_\_

Do you have employees (including yourself)? Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, how many? \_\_\_\_\_\_\_\_\_

Do you pay 1099 vendors (contractors)? Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, approx how many? \_\_\_\_\_\_\_

Do you need job cost reports? Yes \_\_\_\_\_ No \_\_\_\_\_

What’s the average number of monthly checks written? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What’s the average number of monthly credit card purchases? \_\_\_\_\_\_\_\_\_\_\_\_\_

What’s the average number of monthly deposits? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How many business bank accounts do you have? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do you use industry specific software? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, what’s the name of software \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Does it integrate with QBO? Yes \_\_\_\_\_ No \_\_\_\_\_ Don’t know \_\_\_\_\_

Describe any future plans for business (e.g., purchase building, open add’l location, increase staff, etc.)

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Any additional pertinent information you believe would be helpful for me to know about your business

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