

Become a client

About six minutes. No tax ID numbers or bank details: those come later, through our secure portal.

Questions marked * need an answer.

About you

1. Your name *

2. Email *

3. Phone *

4. Postal address *

Street address

Address line 2

City or suburb

State or region

Postcode or ZIP

5. How should we contact you?

- ☐ Email ☐ Phone call ☐ Text message

6. Who is this for? *

- ☐ Just me ☐ Me and my spouse or partner ☐ My business
☐ Me and my business

7. Spouse or partner's name

Only if "Who is this for?" is Me and my spouse or partner.

8. Filing status

Only if "Who is this for?" is Just me, Me and my spouse or partner or Me and my business.

- ☐ Single ☐ Married filing jointly ☐ Married filing separately
☐ Head of household ☐ Qualifying surviving spouse ☐ Not sure

9. Your occupation

Only if "Who is this for?" is Just me, Me and my spouse or partner or Me and my business.

10. How many dependants do you have?

Only if "Who is this for?" is Just me, Me and my spouse or partner or Me and my business.

Your business

11. Business legal name *

Only if "Who is this for?" is My business or Me and my business.

12. Business structure *

Only if "Who is this for?" is My business or Me and my business.

- | | |
|---|---|
| ☐ Sole proprietor | ☐ Single-member LLC |
| ☐ Partnership or multi-member LLC | ☐ S corporation |
| ☐ C corporation | ☐ Nonprofit |
| ☐ Trust or estate | ☐ Other: _____ |

13. What does the business do?

Only if "Who is this for?" is My business or Me and my business.

14. When did the business start?

Only if "Who is this for?" is My business or Me and my business.

Date

15. Financial year-end

Only if "Who is this for?" is My business or Me and my business.

- | | | |
|-------------------------------|--------------------------------|---------------------------------|
| ☐ January | ☐ February | ☐ March |
| ☐ April | ☐ May | ☐ June |
| ☐ July | ☐ August | ☐ September |
| ☐ October | ☐ November | ☐ December |

16. How many employees?

Only if "Who is this for?" is My business or Me and my business.

17. Which accounting software do you use?

Only if "Who is this for?" is My business or Me and my business.

- | | | |
|---|--|----------------------------------|
| ☐ QuickBooks Online | ☐ QuickBooks Desktop | ☐ Xero |
| ☐ MYOB | ☐ Sage | ☐ FreshBooks |
| ☐ Wave | ☐ Spreadsheets | ☐ None yet |
| ☐ Other: _____ | | |

18. Who does your bookkeeping now?

Only if "Who is this for?" is My business or Me and my business.

- | | | |
|--------------------------------------|------------------------------------|-------------------------------------|
| ☐ I do it myself | ☐ A bookkeeper | ☐ Our own staff |
| ☐ Nobody yet | | |

What you need

19. Which services do you need? *

- | | | |
|--|--|---|
| ☐ Individual tax return | ☐ Business tax return | ☐ Payroll |
| ☐ Sales tax | ☐ Bookkeeping | ☐ Tax planning or advice |
| ☐ Catching up on late returns | ☐ Other: _____ | |

20. Roughly how many transactions a month?

Only if "Which services do you need?" is Bookkeeping.

- | | | |
|-------------------------------------|---------------------------------|----------------------------------|
| ☐ Under 50 | ☐ 50 to 200 | ☐ 200 to 500 |
| ☐ More than 500 | | |

21. Do you have an accountant now?

- | | |
|---------------------------|--------------------------|
| ☐ Yes | ☐ No |
|---------------------------|--------------------------|

22. What is prompting the change?

Only if "Do you have an accountant now?" is Yes.

23. Have you had letters from the IRS or your state that you need help with?

- | | |
|---------------------------|--------------------------|
| ☐ Yes | ☐ No |
|---------------------------|--------------------------|

24. Can you give us last year's return?

- | | |
|---------------------------|--------------------------|
| ☐ Yes | ☐ No |
|---------------------------|--------------------------|

25. How did you hear about us?

- ☐ A friend or colleague ☐ A search engine ☐ Another adviser referred me
☐ Social media ☐ A local event ☐ Other: _____

26. Anything else we should know?

What happens next: we reply within [2 business days] to book a first meeting. We never ask for Social Security numbers, bank details or card numbers on this form. Once you engage us, we collect what your return needs through our secure client portal. Privacy policy: _____.