

WILLHAM



ACCOUNTING, LLC

INFORMATION:

How did you hear about us? _____

Client Name: _____

Contact Name: _____ Contact Number: _____

Company Name: _____ Date Business Started: ___/___/___

Address: _____

Phone no.: _____ Mobile: _____

E-mail: _____

Web site: _____

Entity Type: _____

If LLC did you file form 8832? YES or NO

S-Corp: _____ , (Please provide copy of Form 2553.)

EIN number: _____

Accounting Software used: _____

GENERAL QUESTIONS:

Are your tax return filings up-to-date? YES or NO Date last filed: ___/___/___

Are you interested in tax planning services? _____

New Client Question Form

Rev. B

WILLHAM



ACCOUNTING, LLC

Do you have payroll? _____

Do you outsource payroll? YES or NO

Are you enrolled in the IRS EFTPS? YES or NO

Are enrolled in FDOR on-line File & Pay? YES or NO

Payroll tax deposits up-to-date? YES or NO

Do you use check registry? YES or NO

Do you need monthly or Quarterly Service? _____

Do you use your personal car for business? _____

Do you need assistance with financial statements? YES or NO

Would you like to have Custom Reports to analyze your business? YES or NO

(THIS AREA TO BE COMPLETED BY WILLHAM ACCOUNTING.)

Meeting Purpose:

Meeting Objective (s):

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

New Client Question Form

Rev. B