



Prospective Client Questionnaire for Businesses

Please complete this questionnaire and email it to
kmortimer@premiertaxsuccess.com or fax it to 706-632-3925

We want to thank you for sharing your information with us. This information will remain confidential and will be used to see if you are a good fit for our firm. We want to provide the best customer service possible, while helping you achieve financial goals. We hope to be able to work with you soon.

– Jonathan Bill, Owner

Business name: _____

Date established: _____

What type of business is it?

What service does your business provide? _____

**Please be prepared to provide copies of the previous two (2) years of tax returns and Depreciation Schedule, if applicable*

Business mailing address: _____

City: _____ State: _____ ZIP: _____

Business phone: _____ Personal phone: _____

Email: _____

Website: _____

Would you like to receive the Premier Tax & Accounting Services newsletter?



Main contact for business: _____ Phone: _____

Email: _____

Please list the names of all shareholders/officers/members/owners:

Latest tax year filed with IRS? _____

Are you behind on any tax filings or payments?

Have you ever been audited by any government agencies?

If yes, please provide an explanation:

Are you involved in any lawsuits with your business?

Have you filed Bankruptcy?

Are you currently using an accounting firm?

What is the subject of your request for appointment?

How did you hear about our firm? Please be specific:

What is your goal(s) for our firm & your business to achieve together?



What type of help do you need (check all that apply):

Tax Accounting Payroll Sales Tax Other

Payroll Information:

How many employees do you have? _____

How often do your employees get paid? _____

How many subcontractors do you have? _____

Bookkeeping:

How many checking accounts do you have? _____

Approximate number of transactions per month? _____

Do you use your business checking account to pay personal expenses?

Sales Tax

Filing Frequency: _____

POS/ Accounting System: _____

Multiple States?

Is there any other information we should know that could help us serve your accounting needs?
