

Date:

**PROSPECT QUESTIONNAIRE**

**Prospect Information**

Business Name:

Phone:

Address:

City: State: Zip code:

Email Address:

Preferred Contact Method:

Decision Maker(s) Name:

Type of Business/Product or Service offered:

Legal Entity Type:

Number of years in Business:

Current CPA:

How did you hear about us? (*Referred By*)

**Discovery Questions**

*Advisory team:*

Why are you looking for a new CPA?

What services are you getting from them?

What accounting software do you use?

What traits do you look for in your business partners?

Does your company have a bookkeeper?  Yes  No  
If no, would you like a referral?  Yes  No

How often are the business books reconciled?

Do you have an attorney?  Yes  No  
If no, would you like a referral?  Yes  No

Do you have a financial planner?  Yes  No  
If no, would you like a referral?  Yes  No

*Goals:*

What is the top problem or issue you need help with?

Are you looking for:  A plan that you can execute  
 A plan that we execute together?

What is your revenue goal?

What is your employee count goal?

What is your budget?

Would you consider yourself knowledgeable about how your taxes are structured?  Yes  No  
If no, would you like to learn more?  Yes  No

**PROSPECT QUESTIONNAIRE**

*Getting to know you:*

Do you typically file your taxes on time?  Yes  No  
If not, why?

What do you enjoy most about the work you do?

What do you want us to know about your business?  
(your story/background)

*Do you have any of the following?*

W-2 Income

Independent Contractor Income

Number of states income is derived from:

Investment Accounts (i.e. brokerage accounts)

Stocks (held individually – E-Trade, etc.)

Company Stock Options

Retirement/ Pension Plans

Retirement/Pension distributions taken

Personal Residence

Rental Property

Total Number of rental properties:

Out-of-State Rental Property

Additional Notes:

**Scheduled Meeting Details**

What days and time are good for meetings?  
We are currently holding meetings via video.

*Thank you*