

# New Client Application with Business

Approved: Y  N

Your Name: \_\_\_\_\_

Your Address: \_\_\_\_\_

Business Name: \_\_\_\_\_

Business Address: \_\_\_\_\_

Your Email: \_\_\_\_\_

Phone Number: Cell: \_\_\_\_\_ Home: \_\_\_\_\_ Work: \_\_\_\_\_

Prior Yr Revenue: Gross: \_\_\_\_\_ Net: \_\_\_\_\_

CY Revenue (est): Gross \_\_\_\_\_ Net: \_\_\_\_\_

# of Employees: FT: \_\_\_\_\_ PT: \_\_\_\_\_

## Looking for the Following Services (check all that apply):

- Personal Tax Return Preparation
- Business Tax Return Preparation
- Tax Planning
- Bookkeeping
- Other: \_\_\_\_\_

Y:  N:  I offer health benefits for employees

Y:  N:  I offer retirement benefits for employees

Y:  N:  I manage an investment portfolio

Y:  N:  I manage business or investment real estate

What's your "exit strategy" for the business? (walk away, sell, leave to family, etc.) \_\_\_\_\_

What is your biggest business or financial frustration? \_\_\_\_\_

How did you hear about us? \_\_\_\_\_

Briefly describe what you're looking for from your accountant: \_\_\_\_\_

Your initial meeting may be subject to a **\$500 retainer** for tax advice, which may be applied toward services rendered. Providing your e-mail address and phone number authorizes Paul Dion CPA and staff to contact you. We will never sell or give out your information to third parties. By signing, you agree to the terms of this application.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_