

PROSPECT QUESTIONNAIRE

Date: _____

Prospect Information

Prospect Name: _____ Prospect Phone: _____

Prospect Business Name: _____

Address: _____

Prospect Email Address: _____

Decision Maker(s) Name: _____

Type of Business: _____ Entity Type: _____

Current CPA: _____

Referred By: _____

Relation to an Existing Client: _____

Timeframe for Decision or Urgency: _____

Discovery Questions

Why are you looking for a new CPA: _____

Big Picture - What are you looking for?

- What are the top 3 problems or issues you think you need help with? _____

- On a scale of 1 to 10 (with 1 being the least), how knowledgeable are you about how your taxes are structured or how your taxes work? _____

Employee/Independent Contractor

PROSPECT QUESTIONNAIRE

- How many employees do you have full-time _____ part-time _____
 - Do you offer fringe benefits to your employees (i.e. Health, Retirement)?
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Company Policies

- Do you have a complete corporation records book? _____
- Do you have current company minutes? _____
- Do you have the proper expense reimbursement policies? _____

Current Accounting System

- What accounting system do you use? _____
- How do you current handle your payroll? _____
- What services are you NOT getting from your current accounting relationship? _____

- With your current CPA, do you have a fixed fee engagement, by the hour, or other? ____

Scheduled Meeting Details

Date: _____ Time: _____ With: _____

Prospect Meeting Data to Gather - Remember to Bring

Copy of Last 2 Years Tax Returns – Business and Personal	YTD P&L and Balance Sheet
YTD Tax Payment and/or Paystubs	Copy of QuickBooks File
Corporation Record Books	Personal Financial Statement
Business Cash Flow Projection or Budget (If Any)	IRS/State Tax Notices (If Any)