

PROSPECT QUESTIONNAIRE

Date: _____

Prospect Information

Prospect Name: _____ Prospect Phone: _____

Address: _____

Prospect Email Address: _____

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? _____
- 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? _____

PROSPECT QUESTIONNAIRE

Scheduled Meeting Details

Date: _____ Time: _____ With: _____

Prospect Meeting Data to Gather – Remember to Bring

Copy of Last 2 Years Tax Returns

Personal Financial Statement (If Available)

YTD Tax Payment and/or Paystubs

IRS/State Tax Notices (If Any)