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New Client
Get Acquainted Questionnaire
(For business owners only)

Date: _____

Name: _____ Title: _____

Office Address: _____

Email: _____

Office Phone Number: _____

Home Number: _____

Fax Number: _____

Cell Number: _____

1. Are you the sole owners of the business? Yes No _____

2. If no, who else is involved? _____

3. Do you currently have a CPA? Yes No _____

21. If not, do you ever have to come up with a lump sum at the end of the year or after taxes are filed? _____

22. Do you make estimated tax payments? _____

23. Do these estimated payments cover your yearly tax bill? _____

24. What do you hope to gain from our consultation? _____

25. What are you goals for your business in the next 6 months: _____

1 year: _____

5years: _____

26. What are your goals for yourself in the next 6 months: _____

1 year: _____

5 years: _____

27. Do you have a business plan? _____

If yes, for how many years? _____

28. Do you have a financial planner? _____

29. Are you open to financial planning? _____

30. Do you have a broker? _____

31. Do you have a will? -----

32. Do you have a living trust? -----

33. Are you interested in a living trust? -----

34. What investments do you have? (Check all that apply)

- 1. Stocks _____
- 2. Bonds _____
- 3. Mutual Funds _____
- 4. Collectibles _____
- 5. Rental Property _____

35. Do you have a retirement plan/fund? Approximately how much is in it? -----

36. What would you like your income to be at retirement yearly? _____

37. At what age would you like to retire? _____

38. Please rate the following in importance: one (1) being of the lowest importance to five (5) being the highest of importance.

	lower importance		higher importance		
	1	2	3	4	5
A. Saving money on taxes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. More profit from your business (Making more money)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Accurately prepared tax return to avoid audit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

