



Palmer, Brady & Company^{PLLC}

Certified Public Accountants & Consultants

New Client Worksheet

Bookkeeping

Which version of accounting software do you use?

QuickBooks Desktop

QuickBooks Online

Other

If you use QuickBooks Desktop, what year and version is it?

Year

Version

Would you be willing to consider converting to QuickBooks Online?

Yes

No

Please identify the services you are interested in:

Bank reconciliations

Record accounts payable invoices.

Review of financial reports

Record daily transactions

Prepare financial reports

Prepare 1099s annually

Other

Other

Additional comments: