



Suguitan & Associates

A Professional Limited Liability Company

Thank you for your interest in Suguitan and Associates. To ensure we are the right fit for each other, we have a few preliminary questions regarding your tax and accounting needs. Please fill out the information below so that Jennifer Suguitan can review it before your first meeting. This will allow your meeting to be the most effective and informative.

Some things to know about us ahead of time: we do upfront pricing and we offer a fee structure based on 3 package levels: Gold, Silver, and Bronze. Our very basic Bronze individual tax package for a new client starts at \$1100 and our very basic Bronze entity package starts at \$1500. We offer both tax preparation packages and bookkeeping packages. You can expect to receive a goals and objectives letter after your first meeting with Jennifer to make sure we align after our initial meeting. Once we have agreed on your goals and objectives we will issue you a price proposal letter with a fee structure that is customized to your needs.

Prospective Client Information

Primary Taxpayer Name: _____

Email address: _____

Phone #s: _____ (Cell) _____ (Work)

What is the preferred method of contact? Email Cell # Work # Home #

What is the preferred method of contact? _____

Spouse Name: _____

Spouse Email address: _____

Phone #s: _____ (Cell) _____ (Work)

What is the preferred method of contact? Email Cell # Work # Home #

Address: _____

City _____ State _____ Zip _____

Phone #: _____ (Home)

Who is the primary contact? _____

Number of Dependents? _____

Referred by: _____

Entities, if applicable:

Entity Name: _____

Type: Partnership Corporation S-Corporation Trust Sole Proprietor (Schedule C)

Primary Contact Name: _____

Phone #s: _____ (Work) _____ (Cell)

Entity Name: _____

Type: Partnership Corporation S-Corporation Trust Sole Proprietor (Schedule C)

Primary Contact Name: _____

Phone #s: _____ (Work) _____ (Cell)

Entity Name: _____

Type: Partnership Corporation S-Corporation Trust Sole Proprietor (Schedule C)

Primary Contact Name: _____

Phone #s: _____ (Work) _____ (Cell)

Questions for Taxpayer:

What are you looking for from your CPA advisor? _____

What concerns to you have with your taxes and/or financial situation? _____

What financial goals to you hope to accomplish over the next few years? _____

