



BUSINESS CLIENT QUESTIONNAIRE

BUSINESS INFORMATION:

BUSINESS NAME:

BUSINESS ADDRESS:

PRIMARY CONTACT:

WORK PHONE:

FAX:

CELL PHONE:

EMAIL 1:

EMAIL 2:

BUSINESS WEBSITE:

TYPE OF BUSINESS: C-Corp, S-Corp, Sole Proprietor, Partnership

Name of your Banking Institution?

How many years have you been in business?

Do you have Partners / Other Shareholders? If yes, please describe (i.e. - type, ownership %, agreements, etc.):

Are you profitable? (If not, how do you plan on covering operations and cash flow?)

Why are you contacting Valiante Tax & Financial Management? What service(s) would you like us to provide you?

PLEASE PROVIDE US WITH COPIES OF YOUR LAST 3 YEARS OF FEDERAL AND STATE TAX RETURNS

SERVICE RELATED QUESTIONS:

How did you learn about Valiante Tax & Financial Management?

What are your expectations of your Accountant?

Do you have a current/previous Accountant/Accounting Firm?

Do you have an outstanding balance with your previous Accountant?

Have you informed your current Accountant/Advisor that you are meeting with Valiante Tax & Financial Management?

What DON'T you like, or did you NOT like about dealing with your current Accountant/Accounting Firm?

What DO you or DID you like about dealing with your current Accountant/Accounting Firm?

What is your Annual Advisor budget?

How important is rapid response on Accounting and Tax questions to you?

What do you consider a rapid response?

Please rate your Company's strength in the following areas using a 10 point scale with 1 = Poor / 10 = Superior

Overall vision / mission strategy		Administration	
Sales / Marketing		Inter-Dept Cooperation	
Leadership		Succession Planning/Exit Strategy	
Finance / Cash Flow / Banking			

Who are your most influential Advisors and how frequently do you contact them for advice?

What is your current "pain", i.e. business problem?

How do you see Valiante Tax & Financial Management helping you address these challenges and opportunities?

SERVICE RELATED QUESTIONS: (continued)

What growth plans do you have for this coming year, and next 3 – 5 years?

Do you expect Capital needs? New Financing?

What are the three most importance future issues that will impact your Company's performance?

Do you prepare an Annual Budget or Financial Forecast?

Are you concerned about any of your Assets, Liabilities, Income Statement or Accounts to which we should pay particularly close attention? If so, please list:

Would you be comfortable if we were to attend one/some of your integral internal Company management meetings as observers?

How do you suggest we best learn about your business so we can relate your operations to the financial information and so we can be more proactive in helping you maximize your business success?

May our associates tour your facilities?

What trade journals do you read? What seminars and trade shows do you regularly attend?

Is your bookkeeping system: ___ manual ___ computerized - what software do you use? _____

For how long? _____ Who set-up your systems? _____

Do you employ a bookkeeper? ___ full-time ___ part-time If not, who is in charge of the following:

Paying bills _____ Reconciling bank accounts _____

Making Deposits _____ Tracing customer accounts / billing / statements _____

General Ledger and other bookkeeping _____

Please rate your satisfaction with your current bookkeeping system, using a 10 point scale 1 = Low / 10 = High

Ease of Use

Cost of Customer support

Ability to grow with my business

Comprehensiveness in addressing the needs of the business

Usefulness of information

Overall satisfaction

SERVICE RELATED QUESTIONS: (continued)

Do you prepare your own payroll? If so, do you utilize software? What software? _____

If you use a Payroll Company, please provide contact info: _____

Do you expect your Accountant/Advisor to contact you periodically throughout the year?

What is your preferred method of communication with your accountant/advisor (telephone / email / meet in person / mailings)?

How do you feel about being contacted by a firm member other than your initial contact?

Do you envision any other changes in your needs?

If price weren't an issue, what role would you want us to play in your business:

What evidence will you need to see in six (6) months to determine whether you have made the correct decision to hire us?

Please list any other service-related items or other discussion/disclosure points that you feel strongly about that we have not covered in this questionnaire?

OWNERS INFORMATION:

LAST NAME:		FIRST NAME:	MI
ADDRESS:			
CITY		STATE	ZIP
HOME PHONE:	WORK PHONE:	CELL PHONE:	
FAX:	EMAIL:		
Do you have a home office? YES NO		Type of Internet Access, if any:	

Would you like to receive our Monthly Newsletter? YES / NO

CO - OWNERS INFORMATION:

LAST NAME:		FIRST NAME:	MI
ADDRESS:			
CITY		STATE	ZIP
HOME PHONE:	WORK PHONE:	CELL PHONE:	
FAX:	EMAIL:		
Do you have a home office? YES / NO		Type of Internet Access, if any:	

OTHER OWNER'S INFORMATION:

LAST NAME:			
ADDRESS:		FIRST NAME:	MI
CITY			
HOME PHONE:		STATE	ZIP
FAX:	WORK PHONE:	CELL PHONE:	
Do you have a home office? YES / NO		EMAIL:	