

NEW BUSINESS CLIENT INFORMATION

Contact Information

Company: _____ EIN: _____ - _____

Business Address: _____

City: _____ State: _____ Zip: _____

Business Start Date: ____ / ____ / ____ Business Website: _____

Business Phone: (____) _____ Business Email: _____

Company Bookkeeper: _____ Bookkeeper Contact Info: _____

Company Attorney: _____ Attorney Contact Info: _____

Company Financial Advisor: _____ Advisor Contact Info: _____

Member/Partner: _____ % Member/Partner: _____ %

Member/Partner: _____ % Member/Partner: _____ %

Type of Industry: _____

How did you hear about us? _____

Referred by: _____

Service Related Questions

Why are you contacting Eger CPA? _____

What do you expect of your CPA? _____

What is your current "pain," i.e. business problem(s)? _____

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

Please rate your Company's strength in the following areas, using a 5 point scale. 1=Poor & 5=Superior:

Overall Vision/Mission/Strategy?	_____	Leadership?	_____
Finance/Cash Flow/Banking?	_____	Administration?	_____
Inter-Departmental Cooperation?	_____	Sales & Marketing?	_____
Succession Planning or Exit Strategy?	_____		

What keeps you "awake at night" regarding your business? _____

What are the three most important current issues impacting your company's performance? _____

If price weren't an issue, what role would you want Eger CPA to play in your business? _____

How often would you like to meet with your accountant/advisor? _____

Fill in the circle. Which of these services you would like to learn more about?

- | | |
|---|--|
| <input type="radio"/> Business Tax Preparation | <input type="radio"/> Budgets or Forecasts |
| <input type="radio"/> Owner's Tax Preparation | <input type="radio"/> Cash Flow Planning |
| <input type="radio"/> Tax Planning for Business & Owners | <input type="radio"/> Accounting Software Consultation |
| <input type="radio"/> Preparing Annual Financials | <input type="radio"/> Accounting Software Training |
| <input type="radio"/> Quarterly/Semi-Annual Financials | <input type="radio"/> Bookkeeping Services |
| <input type="radio"/> Estate Planning for Owners | <input type="radio"/> Financial Planning for Owners |
| <input type="radio"/> Business Valuation for Estate Planning or Buy/Sell Agreements | |

Please list any services, not mentioned above, that you are interested in: _____

General Reminders

Please provide the following documents: 1. A complete copy (Federal, State, Local) of your prior 2 years' tax returns. 2. A copy of our Organizing Documents, referred to as your "Permanent File," including your Articles of Organization, Official IRS Correspondence (EIN, S-Corp Election), and other initial business/employer registration filings (Fed, State, Local, Employment Tax Registration, etc.)



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