

# Client Intake Form:

Thank you for considering **Simple and Easy Bookkeeping LLC**! Please fill out this form so we can understand your needs. We'll follow up to discuss the best way to support your business.

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## Section 1: Basic Information

1. **Full Name:**
  2. **Business Name:**
  3. **Business Website:**
  4. **Email Address:**
  5. **Phone Number:**
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## Section 2: Business Details

5. **Business Structure:**
    - ☐ Sole Proprietor
    - ☐ LLC
    - ☐ S-Corp
    - ☐ C-Corp
    - ☐ Partnership
    - ☐ Nonprofit
    - ☐ Not sure
  6. **Industry / Nature of Business:**
  7. **How long has your business been operating?**
    - ☐ Just getting started
    - ☐ Less than 1 year
    - ☐ 1–3 years
    - ☐ Over 3 years
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## Section 3: Bookkeeping Needs

10. **Which services are you interested in?**
  - ☐ Monthly Bookkeeping

- Catch-up / Clean-up Bookkeeping
- Payroll Tracking
- Not sure – need guidance

**11. Which accounting software do you use?**

- QuickBooks Online
- QuickBooks Desktop
- Xero
- Wave
- Excel / Manual
- None

**12. Are your books up to date?**

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**Section 4: Goals & Preferences**

**13. What's your biggest bookkeeping challenge right now?**

**14. What are your financial goals over the next 6–12 months?**

**15. What does an ideal solution or outcome look like for you?**

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