

# **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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