

# NELSON | TAX & ACCOUNTING

Thank you for contacting Nelson Tax & Accounting. To determine if we are a good match for you and your business, please answer the following questions and return to our office.

**Name of business(es):** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Owner(s) name and contact information:** \_\_\_\_\_

\_\_\_\_\_

**Additional contact(s) and role within the business:** \_\_\_\_\_

\_\_\_\_\_

**Describe your business(es):** \_\_\_\_\_

\_\_\_\_\_

**How did you hear about NCPAs?** \_\_\_\_\_

**Year business(es) started:** \_\_\_\_\_

**How is your company taxed? (check)**

S-corp

C-corp

Sole Proprietor

Partnership

Non-profit

**Last year tax return was filed:** \_\_\_\_\_

**What are your forecasted earnings for the year?** \_\_\_\_\_

**Why are you changing accountants?** \_\_\_\_\_

\_\_\_\_\_

**Is there anything your former firm did that did not meet your expectations?**

\_\_\_\_\_

**What services are you considering?**

	Definitely	Maybe	Not At All
Bookkeeping			
Monthly			
Quarterly			
Annually			
Sales tax reporting and payment initiation			
Making deposits, paying bills			
Reconciliation of the balance sheet accounts			
Financial statement preparation			
Budgeting: formation and upkeep			
Payroll Service			
Retirement plan funding			
Officer compensation calculations			
Insurance audits			
Advisory services / consulting			
Tax planning and projections			
PPP loan forgiveness / ERC			
Business tax return			
Individual tax return			
Other:			

**What is your budgeted expense for professional services?** \_\_\_\_\_

**What software do you use for bookkeeping?** \_\_\_\_\_

**Would you be willing to let Nelson Tax & Accounting have remote access into your books and/or bank accounts?** \_\_\_\_\_

**Are there any areas from the list above where you are not compliant? If so, what.**

\_\_\_\_\_

**Are you willing to provide full disclosure?** \_\_\_\_\_

**Do you have plans to expand or scale back operations?** \_\_\_\_\_

\_\_\_\_\_