



# Client Questionnaire

## **BUSINESS DETAILS**

- Business name:
- Owner:

## **FINANCIAL INFORMATION**

- Bank
- Password & security questions (you can make me a unique login)
- Other accounts used (credit, PayPal, etc.)
- Accountant name
- Accountant email/phone
- Categories of receipts

## **QUESTIONS TO ASK POTENTIAL CLIENTS**

1. What version of QuickBooks do you have (if any)? Do you need to access QuickBooks on a regular basis?
2. How do you organize receipts/financial documents?
3. How many employees do you have (if any?) Which payroll service do you use?
4. Is there anything unique about how you do banking (PayPal account, credit cards, etc)?
5. Is there anything unique about how you'd like your P&L organized (pre-set accounts, classes, tracking jobs, etc.).
6. How do you prefer I communicate with you (text, email, call)? Would you prefer a monthly phone call or questions as they come?
7. What is the price range you are looking for (per month) for a bookkeeper?

8. What is the biggest challenge in your business right now?
9. What else do you need from me?

### **NEED HELP WITH A CLIENT CONTRACT?**

I've partnered with The Legalpreneur, and they have a bundle for contracts and website policies that is perfect for getting your business started legally (search "accounting" to find the bundle that is perfect for bookkeepers): [The Legalpreneur Accounting Bundle](#)

### **NEED HELP FINDING AND ONBOARDING CLIENTS?**

Join me inside [Bookkeeper Marketing Coach](#). This self-paced course teaches you how to stand out from other bookkeepers, which marketing channels to use, how to leverage and grow your network, and how to speak to potential clients. You'll gain the knowledge and confidence to onboard your next three bookkeeping clients.