

FINCH CPA FIRM PLLC

Sandra Finch, CPA, CFP, CTC

New Client Application

Business Name: _____

Business Inception Date: _____ If not a Texas Business, What State? _____

Structure of Business for Taxes: _____

C-CORP

S-CORP

PARTNERSHIP

SOLE PROPRIETERSHIP

Is your business located in the Houston area or Austin area ? _____

Prior Year Gross Sales: \$ _____ Estimated Current Yr Gross Sales: \$ _____

Current Owners: Name and Percentage of Ownership

Name: _____ % _____

Name: _____ % _____

Name: _____ % _____

Name: _____ % _____

Name: _____ % _____

Services requested:

Bookkeeping

- Record transactions (Checking, Deposits, etc.)
- Assist with General Journal Entries
- Clean up or correct general ledger
- Reconcile bank statements
- Assist with payroll/payroll entries
- Oversee your bookkeeper/controller's work

Financial Statements

- Compiled financial statements
- Management Use Only financial statements
- Business plan projections

(This firm does not perform reviews or audits.)

Tax Services

- Individual tax return (1040)
- Business tax return (1120, 1120S, 1065)
- For Year(s) _____
- Officer Compensation/Benefits Analysis
- Mid Year Tax Planning
- Year End Tax Planning

Other Services

- New Business Consultation
- Set up or Revise Accounting Systems
- Best Entity Choice Analysis
- Representation before the IRS
- Retirement Planning
- QuickBooks Training
- Financial Planning
- Special/Other: _____

(Business Exit Strategies are performed by our sister company Finch Exit Strategies PLLC)

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Questions:

New Client Application

Who does your internal, day- to- day bookkeeping now? _____

What are their qualifications? _____

Who is your CPA firm now? _____

Why are you seeking a new CPA? _____

How many employees do you have? _____

Who does your payroll now? _____

Do you have a retirement and/or 401k plan? _____

Who will be our main point of contact with your business *and* email address: _____

Phone number of main contact: _____

Date of Birth/Date of Birth Spouse: _____

Main issue we have now (you may check more than one):

- New business - need entity analysis and education
- New business - need our books set up
- We don't think our books are right
- We think we pay too much in taxes
- We may not be the optimum tax entity structure
- Our current CPA doesn't talk to us/answer questions
- Our current CPA takes too long to do our books/taxes
- Our current CPA is not proactive in planning
- We need help dealing with a current IRS issue
- Owners don't have sufficient retirement funds

Who may we thank for referring you to our practice? _____