

Thank you for considering **Quiñones & Co., Inc.** for your tax and accounting needs. To further assist you and see if we are a right fit for your company please answer the following questions.

What year did you establish your business? \_\_\_\_\_

What is the industry of your business? \_\_\_\_\_

**What does your business need MOST? [Check applicable]**

- Annual tax returns preparation
- Payroll preparation service
- Monthly Bookkeeping
- Monthly assistance with reading and responding to tax letters and other correspondence
- Tax Planning - minimizing taxes and planning for tax deductions and credits
- Cash flow and debt planning - Help to plan out income and expenses of your business
- Financial Planning - on the personal side, retirement planning and involves being ready to exit your business
- IRS, FTB or EDD Collections representation--need help obtaining a payment plan or other settlement solution
- Audit representation - before IRS, FTB, EDD
- Strategy and goal setting on a regular basis
- Setting up controls in your business - include quality control and safeguarding of assets
- Quickbooks system assistance-- with setup and training, and ongoing
- Financing real estate - assistance in acquiring and financing real estate, personal and commercial
- Asset protection - setting up corporations or LLC's
- Estate planning - involves setting up a living trust and will, and planning transfer of assets
- Exit planning which includes financial planning and succession
- Other: \_\_\_\_\_

Are you currently working with Enrolled Agent, CPA, Other, Specify? \_\_\_\_\_

Are you current with all of your tax filings? \_\_\_\_\_

**Do you owe any back taxes?** \_\_\_\_\_

How Much? \_\_\_\_\_

Are these personal or business taxes that are owed? \_\_\_\_\_

Which Agency? \_\_\_\_\_

**How do you currently track your business income and expenses? [Check all applicable]**

- Quickbooks Desktop
- Quickbooks Online
- Xero.com
- Excel
- No Tracking system
- Other, Specify: \_\_\_\_\_

What is the name of your current business bank? \_\_\_\_\_

Do you currently use online banking? \_\_\_\_\_

How did you hear about us? \_\_\_\_\_

Filled out by: \_\_\_\_\_