



Getting To Know You!

Thank you for contacting us! We are honored you have entrusted us to be with you along your business journey!

We are very selective about who we work with because we believe that a successful relationship between accountant/consultant and client needs to be compatible and harmonious! We want to ensure we are right for you and you are right for us 😊

Complete the information below and return prior to your initial consultation.

Your Name: _____

Business Name *If Applicable: _____

Website : _____ Instagram Handle _____ Twitter _____

Business Email: _____ Personal Email: _____

Best Email to Use?: Business / Personal Additional: _____

Phone Number: _____ Better to TEXT or CALL

How did you hear about us? _____

What are you hoping to gain from our first consultation?



Getting To Know You!

What about your business ignites your passion?

What about your business causes you anxiety/frustration/confusion?

What services are you most interested in:

- ☐ Tax Planning
- ☐ Consulting
- ☐ Bookkeeping
- ☐ Tax Filing
- ☐ Financial Planning
- ☐ Business Growth / Structuring / Scaling
- ☐ HR/Payroll Services
- ☐ Setting business and books?

Why do you feel we would be a good match for your needs?



Getting To Know You!

BIG PICTURE Questions!

Finish this sentence.

My ideal business looks like:

My ideal home life looks like:

Complete this sentence:

My relationship with money is:

Mark True or False:

I charge my worth T F I am confident in my offerings T F I keep promises to myself T F

I have an open mind T F I welcome constructive criticism and value honesty T F

I take my business seriously T F I invest in myself because it is necessary for growth T F

Please return this form prior to your consultation so we can review and prepare to make the most out of our 30 minutes together.

What should you bring to your consultation? Excellent question!

- Bring your most recent Profit & Loss *If you have one*
- Bring your ideas, hopes, and dreams!!
- If we are meeting about tax questions, be sure to bring your most recent tax return
- Basically bring anything you feel we should look over or see to be able to give you the best advice and determine the best service for you.

See you soon!

POWER TO THE BUSINESS OWNER!!!