

# Are we a good match?

If you are looking for **accounting or payroll services** these are the questions we will ask to get to know you and evaluate whether are a good match.

1. What's your name and email address?
2. When did your business start?
3. What type of business formation is your business? (LLC, S-corp etc.)
4. Do you have a partner in the business?
5. What type of business do you have? (retail, services etc.) ?
6. Do you do any depreciation (for equipment maybe)
7. Do you currently have any outstanding debts you're aware of?
8. How many employees (if any) do you have?
9. *If you have employees how are you currently running payroll?*
10. Do you currently have accounting software (like Quickbooks), has it been diy spreadsheet or are you starting from scratch?
11. Do you need us to help catch up or "fix" your bookkeeping
12. Are your business finances separate from your personal finances?
13. Give us a ballpark for how many expenses you have a month (1-2 pages on a statement or 5+?)
14. How many business bank accounts do you have?
15. Do you need help doing invoicing?
16. Do you have invoicing software?
17. What services were you interested in?
18. Have you been filing state, city and federal taxes?
19. Do you know if your licenses are up to date?
20. Do you have a budget for accounting/payroll services and if so, what is your budget?

When you reach out to us via email or phone, it helps us out if you're ready to answer these questions. We are selective of who we take on as accounting/payroll clients. The answers to these questions help us to make informed decisions. **Thank you!**