Bookkeeping client onboarding questionnaire

Thank you for choosing [insert business name] as your trusted bookkeeping partner. We're excited to work with you and help manage your finances. But before we start, here's a brief questionnaire designed to help us get to know your business and provide you with the best services possible.

Of course, we will keep any information you provide private and confidential.

Basic information about your business:

- What is the legal name of your business?
- Who is the primary contact person?
    - What is their phone number?
    - What is their email address?
- How is your business structured (e.g., sole proprietorship, partnership, LLC, corporation)?
- When was your business formed or incorporated?
- What industry or sector does your business operate in?
- Where is your business located?
- What is your business's employer identification number (EIN)?

Business operations:

- How many employees do you have, and what are their roles?
- Who are your primary vendors and suppliers?
- How many customers do you have?
- Who are your major customers?
- Do you maintain physical inventory? If so, how is it managed and tracked?
- How much revenue do you generate per month, quarter, or year?
- What are the main financial or operational challenges your business is facing?

Financial information:

- What is your business's fiscal year?
- How many bank accounts does your business have, and what are their details?
- Do you use business credit cards? If so, how many and for what purposes?
- What are your primary sources of revenue?
- What are the main categories of expenses in your business?

Accounting and software information:

- Which accounting or bookkeeping software do you currently use, if any?
- Do you have historical financial data available that needs to be integrated? If so, what format is it in?
- What payroll system do you use
- How often do you run payroll?
- What system do you use for invoicing your clients?
- Do you use a point-of-sale system? If so, which one?

Compliance and regulatory information:

- Do you have any specific tax filing requirements or deadlines?
- Do you have any business licenses or permits? If so, which ones, and when do they expire?
- Are there any specific industry regulations or compliance standards that you need to adhere to?

Goals, needs, and expectations:

- What are your short-term and long-term financial goals?
- Do you expect your business to grow in the coming years? If so, by how much?
- What specific services are you expecting from us (e.g., bookkeeping, tax preparation, financial advising)?
- Have you worked with another bookkeeping firm? If so, what was your experience like and why did you choose to switch firms?
- How do you prefer to communicate (e.g., email, phone, in-person meetings)?
- Are you happy to use our secure client portal to manage all of your touchpoints with our firm?
- What type of financial reports do you require and for which accounting periods?
- Are there any other areas where you need support or have specific requirements?

Did you know?

- Firms see **2x faster payments** using TaxDome’s automated billing
- **86% of firms** on TaxDome are **happy with their client portal**
- TaxDome's workflow automation **saves firms up to 40 hours per employee per month**

Start seeing these results within the first month — request a free demo!