

Williams & Associates Tax Services

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(910)-392-1040 Fax: (910) 452-0489

Prospective Client Form

Federal ID No: _____

Business Entity: _____

C-Corp, S-Corp, Sole-Proprietor,
Non-Profit, LLC (filing as Single member),
LLC (filing as S-Corp), Partnership

Name: _____

Title: _____

Phone: _____

Fax: _____

E-mail: _____

Websites: _____

Business Information:

Co. Name: _____

Address: _____

City: _____

State: _____

Zip Code: _____

Do you have a computer? Yes ___ No ___

On a scale of 1-10, how familiar are you with your computer?

What accounting software are you presently using?

Do you have a Financial Advisor? Yes ___ No ___

How many years have you been in business? _____

Do you have an Accountant to prepare your Taxes? Yes ___ No ___

If yes,

Name: _____

Phone # _____

What Method of Accounting the Business is currently using? Cash-basis ___ or
Accrual-basis ___

Type of Business

- Contractor
- Non-Profit
- Service
- Property Management
- Real Estate
- Retail

- Wholesale
- Manufacturing
- Media
- Sales
- Other

Which Service do you prefer?

- Monthly
- Quarterly
- Data Entry
- Payroll
- Tax Service

- Quick Books Training
- Tax Consulting
- Set-up Company File
- Bookkeeping Consulting
- Computer Service
- Bookkeeping Data Entry

How often?

- Weekly
- Monthly
- Annually

- Bi-weekly
- Quarterly

You choose the services that you want; prices depend on your needs.
All services require a signed Confidentiality Agreement and a retainer for all services. Information is confidential.

Please [e-mail](#) this form,
or print it and fax it to us at (910)452-0489. This information is necessary prior to the initial consultation.

How did you hear about us? _____

Name _____ Phone _____