

Welcome to McRuer CPAs! We are excited that you are meeting with us about your business accounting needs. Please fill out the following questionnaire as best you can to help us know how to serve you.

Your name: _____ Your Company name: _____

You operate your business as a:

Proprietorship Partnership Corporation S corporation LLC

Do you follow a fiscal year end or calendar year end ?

Your business phone number: ____ - ____ - _____ Your mobile phone number: ____ - ____ - _____

The best contact email address to reach you: _____

How would you prefer to be contacted? _____

If you wish us to call, what time of day is best for you? _____

How did you learn about McRuer CPAs? _____

How do you currently develop and maintain your business financial information?

- I currently only compile my business financial information for tax reporting or borrowing purposes.
- I use an online tool. If so, which one? _____
- I calculate and determine my business financial information myself.
- It is provided by an in-house person.
- It is provided by an accounting firm or other commercial provider.

Select any accounting solution that you feel would help you meet your business goals:

- A collaborative approach where you may participate and use some of your own efforts and resources to gather information and control your costs.
- Support provided by trained accounting personnel familiar with you and your needs.
- Information and accounting resources available from any location, 24/7, 365 days per year.
- Your information backed up each day, or more often if you wish.
- Secure information and data storage.
- Financial reports available and confirmed by a professional accountant.

How do you currently conduct your payroll?

- I currently do not conduct a payroll.
- I prepare it myself.
- I use an online payroll service.
- It is performed by an in-house person.
- It is performed by an accounting firm or other commercial provider.

Would having more comprehensive and current accounting information, budgeting and tax planning help you and your business to be more successful? Yes No I'm not sure how it would help
I think it would help, but may cost too much I don't need it at this time, but might in the future.

Are you confident your current internal controls sufficiently protect your business's assets and information from unintentional or intentional errors, and from unauthorized use or access? Yes No
I'm not sure if my internal controls sufficiently protect my business information

Describe the accounting and/or bookkeeping issue(s) that cause you most concern as you try to grow your business: