



NELSON CPAs

Thank you for contacting Nelson CPAs, LLC. To determine if we would be a good match for you, please answer the following questions and return to our office.

Name of business(es): _____

Address: _____

Owner(s) name and contact information: _____

Additional contact(s) and role within the business: _____

Describe your business(es): _____

How did you hear about NCPAs? _____

Year business(es) started: _____

How is your company taxed?

S-corp

C-corp

Sole Proprietor

Partnership

Non-profit

Last year tax return was filed: _____

What are your forecasted earnings for the year? _____

Why are you changing accountants? _____

Is there anything your former firm did that did not meet your expectations?

What services are you considering?

	Definitely	Maybe	Not At All
Bookkeeping			
Monthly			
Quarterly			
Annually			
Sales tax reporting and payment initiation			
Making deposits, paying bills			
Reconciliation of the balance sheet accounts			
Financial statement preparation			
Budgeting: formation and upkeep			
Payroll Service			
Retirement plan funding			
Officer compensation calculations			
Insurance audits			
Advisory services / consulting			
Tax planning and projections			
PPP loan forgiveness / ERC			
Business tax return			
Individual tax return			
Other:			

What is your budgeted expense for professional services? _____

What software do you use for bookkeeping? _____

Would you be willing to let NCPAs have remote access into your books and/or bank accounts? _____

Are there any areas from the list above where you are not compliant? If so, what.

Are you willing to provide full disclosure? _____

Do you have plans to expand or scale back operations? _____
