Jeffrey B. Smith, CPA, P.A.
Certified Public Accountants and Consultants

PO Box 91416, Raleigh, NC 27675-1416
(919) 414-5577
jeff@jbsmithcpa.com

Business Client Questionnaire

A few basics about your business so Jeff can prepare a quote.

The business

Business name

Owner name(s)

Entity type

Year started

Industry or type of work

Number of employees

Accounting software

Year-end

Services

What do you need help with?

- ☐ Business tax return
- ☐ Bookkeeping
- ☐ Payroll
- ☐ Sales tax
- ☐ Tax planning
- ☐ Entity choice or S corporation election
- ☐ Financial statements for a lender
- ☐ Buying or selling a business

Notes

Signature

Date

Return this form through your secure client portal at jbsmithcpa.sharefile.com or bring it to your appointment. Please do not email it.