

New Client Application

with Business

Approved: Y N

Your Name: _____
Your Address: _____
Business Name: _____
Business Address: _____
Your Email: _____
Phone/Fax: _____

2014 Revenue: Gross: _____ Net: _____
2015 Revenue (est): Gross: _____ Net: _____
of Employees: FT: _____ PT: _____

Looking for the Following Services (check all that apply):

- Personal Tax Return Preparation
- Business Tax Return Preparation
- Tax Planning
- Bookkeeping
- Other: _____

Y: N: I offer health benefits for employees
Y: N: I offer retirement benefits for employees
Y: N: I manage an investment portfolio
Y: N: I manage business or investment real estate

What's your "exit strategy" for the business? (walk away, sell, leave to family, etc.) _____

What is your biggest business or financial frustration? _____

How did you hear about us? _____

Briefly describe what you're looking for from your accountant: _____

Your initial meeting is subject to a \$250 retainer fee, which may be applied toward services rendered. Providing your e-mail address and phone number authorizes Paul Dion CPA and staff to contact you. We will never sell or give out your information to third parties. By signing, you agree to the terms of this application.

Signature: _____ Date: _____