

Eagle Point Accounting & Tax, Inc.

CLIENT INTERVIEW [BUSINESS]

Today's Date _____

Business Name _____

Owner Name(s) _____

Address _____

City _____

State _____

Zip Code _____

Phone Number _____

Fax Number _____

Email _____

Business Description _____

Federal ID Number _____

Type of Entity _____

How many bank accounts do you have? _____

Do you have any investment accounts? _____

Do you maintain Accounts Receivable? _____

Please provide a Depreciation Schedule of all assets the company owns.

Do you lease Payroll? _____

How many employees do you have? _____

Do you pay Estimated Tax Payments? _____

Typical Items Required for Accounting Services:

- Bank statements & check copies
- Credit card statements for all business cards
- Prior year tax return
- Prior year financial statements
- Cash receipts for business expenses