



Do you have any loans or debts in the company name?

If yes, how many?

Can you provide a list of your assets?

Do you require an invoicing service?

Approximately how many invoices do you issue to customers in a month? If you are not issuing any yet, then how many are you hoping to issue based on your potential contracts and prospects?

If you have been running for a while, what is your annual turnover?

If you are brand new, what is the turnover you are hoping for?

Does your business work with multiple currencies?

Approximately how many transactions run through your bank account on a monthly basis?

An average will do!

Our default reporting deadline is monthly in arrears, will you need your accounts more urgently?

Monthly is fine

Weekly is better

Weekly is imperative!

Other:

On a scale of 1-10, how do you rate your accounting knowledge?

Would you like assistance in understanding and using your monthly financial reports?

How many employees do you have?

Do you need payroll services in addition to your accounting?

Do you need assistance with monthly submissions to the DOL and SARS?

Do you need assistance with annual submissions for Workmens' Compensation?

Do you need assistance with registering for any of the above?

Would you require annual services such as tax returns, provisional returns, CIPC returns and audits or Annual Financial Statements?

If yes, please list which of these you would like assistance with:

YES NO

Would you be interested in additional advisory services such as cashflow management, budgeting and forecasts, or business growth coaching?

Which of these services sound appealing to you? Or is there something else you are looking for?

Do you need assistance with setting up and maintaining your corporate governance?

Is there anything else you want to know, or anything that worries you?

THANK YOU!

Please note that we need all the information in this form so that we can adequately quote you for services required. We take your privacy very seriously and will never share your information with a third party for the sake of marketing or any other commercial use. Please be aware that if you do accept one of our quotations, then we will need to share your information with certain software providers in order to set up your accounts and we will have to share your information with SARS. No other third party will be privy to your information without your express and written permission.