



CULPEPPER AND ASSOCIATES INC

These are a list of questions which will help us to determine how we can best provide you with accounting services. Circle all that apply:

What did your prior accountant do for you?

monthly bookkeeping sales tax monthly financials payroll payroll tax
annual tax returns (business and/or personal)

How do you track your accounting?

QuickBooks other accounting software by hand spreadsheet with Point of Sale system
do not track at all

What services do you want for us to provide?

Monthly bookkeeping Monthly financials Payroll Sales Tax Tax Returns (business and/or personal)
Review of prior years' tax returns (business and/or personal)

When was the last date that you did the following?

You Filed Business or Personal Taxes: _____ Filed Sales Tax: _____

Your Financials Were Prepared: _____

Have you received any notices from taxing agencies? _____

For businesses only:

Where are your business records kept? _____

If you own QuickBooks, we may need to get remote access to your QuickBooks file, is this okay: yes/no Do you maintain separate bank accounts for business and personal: yes/no

Have you been audited in the past: yes/no

What percentage of time do you pay for expenses with: cash _____ debit card _____
cc card _____ check _____

Any other information you think we may need: _____