When a prospect calls to inquire about our services, we need to gather some basic information. This information will be used to assist in determining if the prospect is a good fit for our firm. The person answering the phone will collect information from the prospect and fill out the form below. They will also schedule the prospect meeting and inform the prospect of items to bring to that meeting. The completed form will be given to the firm member meeting with the prospect.

In the event a prospect calls inquiring about the cost for our services or for a tax return, a suggested response is as follows:

Our firm works a bit different. A tax return is the result of critical planning. Our passion is in helping people maximize their post-tax net worth. While cost is a consideration, we start our client relationships by learning about your goals, educating you on becoming tax efficient, and identifying an overall strategy for your business. Your price will be identified after the free initial consultation. Would you like me to schedule a free consultation with one of our professionals?

Date: Staff Completing Questionnaire:

**Prospect Information**

Prospect Name: Prospect Phone:

Prospect Business Name:

Address:

Prospect Email Address:

Decision Maker(s) Name:

Additional Decision Maker(s) Name(s) and Email Addresses:

Type of Business: Entity Type:

Current CPA:

Referred By:

Relation to an Existing Client:

**Discovery Questions**

 What does your company do?

Why are you looking for a new CPA?

What is the top problem or issue you think you need help with?

On a scale of 1 to 10 (with 1 being the least), how knowledgeable are you about how your taxes are structured or how your taxes work?

**Scheduled Meeting Details**

Date: Time: With:

**Prospect Meeting Data to Gather - Remind Client to Bring**

* Copy of Last 2 Years Tax Returns – Business and Personal
* YTD P&L and Balance Sheet
* YTD Tax Payment and/or Paystubs
* Copy of QuickBooks File
* Personal Financial Statement
* Business Cash Flow Projection or Budget (If Any)
* IRS/State Tax Notices (If Any)
* Corporate Records Book
	+ Articles of Incorporation
	+ Partnership Agreement
	+ Certificate of Incorporation
	+ Minutes
	+ By-Laws
	+ Stock Certificates

\*\*NOTE: All decision makers should be present for your consultation.