



## Client Information Intake Form

This form is designed to assist Coleman Business Solutions, LLC (CBS) with gathering information needed to provide quality consulting work. The information requested on this form will be kept confidential by CBS and not shared with any other entities.

### Organization Information

<i>Name of organization</i>		<i>Legal name, if different</i>	
<hr/>		<hr/>	
<i>Address</i>	<i>City, State, Zip</i>	<i>Employer Identification Number (EIN)</i>	
<hr/>		<hr/>	
<i>Phone</i>	<i>Fax</i>	<i>Website</i>	
<hr/>		<hr/>	
<i>Sales Tax Identification Number (if applicable)</i>		<i>Nature of Business</i>	
<hr/>		<hr/>	
<i>Name of contact person within organization</i>	<i>Title</i>	<i>Phone</i>	<i>E-mail</i>
<hr/>			

Number of total staff: \_\_\_\_\_

Geographic area served: \_\_\_\_\_

Annual Revenue: \_\_\_\_\_

Number of years in business: \_\_\_\_\_

Type of Business (check one):

- Sole Proprietorship     
  Corporation     
  S-Corp     
  Nonprofit  
 Partnership/ LLP     
  LLC     
  Individual

## Questionnaire

1. Do you currently use any type of accounting software? If yes, which one?
2. How many vendors are you paying on a monthly basis?
3. How many customers do you invoice weekly? Monthly?
4. Do you have payroll?
5. Do you charge sales tax?
6. Do you have an annual budget for your business?
7. Do you have a store front or commercial office space?
8. Do you track vehicle mileage?
9. Are you currently preparing monthly financial statements and reports?
10. Do you have subcontractors that you issue a 1099 to?
11. Do you have a business bank account?
12. Which forms of payment do you accept from customers?
13. Which form of payment do you use to pay vendors?
14. Have you worked with an accountant or business consultant before?
15. Have you ever been audited by the IRS?
16. Have you filed a tax return for each of the previous five years?

17. Is your business currently facing bankruptcy?
18. Are you currently funded by a business loans?
19. Do you have a business plan?
20. Have you or your business ever been sued in a court of law? If yes, what was the outcome?